Political Thought and Theory: Ideologies, Power, and Society

Robert Stockwell

De Anza College

Social Sciences

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TABLE OF CONTENTS

Licensing

Program Page

Accessibility Statement

About the Book

About the Author

1: Introduction - Thinking about Political Ideologies

1.1: Real Life Examples

1.2: Ideology as Justification

1.3: A Pluralist Approach

1.4: How Ideologies Differ

1.5: Left-Right Spectrum

1.6: Ideologies That Don't Fit

1.7: Left and Right in Canada

1.8: Limits of the Left-Right Spectrum

1.9: Ideologies are Dynamic

1.10: Ideologies Impact Economics, Society, and Politics

1.11: Glossary

1.12: References

1.13: Discussion Questions

2: Indigenous Worldview

2.1: What I learned from Coyote

2.2: As I had shared with Coyote

2.3: I hear a hushed voice

2.4: In the first year

2.5: The dream

2.6: I rest my head

2.7: I look around

2.8: Conclusion

2.9: Glossary

2.10: References

2.11: Discussion Questions

3: Liberalism

3.1: Liberalism and Modernity

3.2: The Values of Liberalism

3.3: Liberalism and its Variants

3.4: Classical Liberalism

3.5: Reform Liberalism
3.6: Neoliberalism
3.7: The Future of Liberalism
3.8: Glossary
3.9: References
3.10: Discussion Questions

4: Conservatism

4.1: Classical Conservatism
4.2: Modern Conservatism
4.3: Libertarianism
4.4: Neoconservatism
4.5: Conservatism in the Future
4.6: Glossary
4.7: References
4.8: Discussion Questions

5: Socialism

5.1: The Socialist Core
5.2: The Diversity of Socialism
5.3: Utopian Socialism
5.4: Libertarian Socialism
5.5: Communism
5.6: Social Democracy
5.7: Socialism Today
5.8: Productivism vs. Environmentalism
5.9: Globalization vs. Anti-Globalization
5.10: Socialist Feminism
5.11: Multicultural and Nationalist Issues
5.12: Conclusion
5.13: Glossary
5.14: References
5.15: Discussion Questions

6: Nationalism

6.1: Modernist and Ethnosymbolic Theories
6.2: Shifting Focus From Sociohistorical and Macro-Sociological Perspectives to Meso and Microsociological Analyses
6.3: The Ethnic-Civic Opposition and Its Limitations
6.4: Contemporary Typologies
6.5: Types of Nationalism - The Case of Quebec
6.6: Nationalism in Time and Space
6.7: Conclusion
6.8: Glossary

6.9: References
6.10: Discussion Questions

7: Populism

7.1: Core Concepts and Themes
7.2: Variants of Populism
7.3: History of Populism
7.4: Populism in the Contemporary Era
7.5: Latin American Populism
7.6: European Populism
7.7: North American Populism
7.8: Asian and Australasian Populism
7.9: The Future of Populism
7.10: Glossary
7.11: References
7.12: Discussion Questions

8: Multiculturalism

8.1: Main Schools of Thought
8.2: The Canadian School
8.3: The Bristol School
8.4: Multiculturalism's Variants
8.5: Official Multiculturalism
8.6: Multiculturalism Policies
8.7: Multiculturalism in Inhospitable Environments
8.8: Multiculturalism's Near and Longer-Term Prospects
8.9: Multiculturalism's Rivals
8.10: A Shift in the Ideological Environment
8.11: Conclusion- Multiculturalism's Limitations
8.12: Glossary
8.13: References
8.14: Discussion Questions

9: Feminism

9.1: Typology of Feminisms
9.2: Equality Politics Through Liberal Feminisms
9.3: Difference Politics Through Maternal/Radical Feminisms
9.4: Diversity Politics Through Postmodern Feminisms
9.5: Diversity Politics Through Reconstructivist Intersectional Feminisms
9.6: Displacement Through Feminist Reconstruction of Diverse Legal Norms
9.7: Displacement Through Feminist Reconstruction of Diverse Parliaments
9.8: Civic Republican Intersectional Feminism
9.9: Displacement of Individualist Liberty Through Feminist Republican Reconstruction of Intersectional Political Liberty

9.10: Conclusion
9.11: Glossary
9.12: References
9.13: Discussion Questions

10: Environmentalism

10.1: Basics of Green Theory
10.2: Climate Crisis
10.3: Climate Change
10.4: Human Security
10.5: Community Threats
10.6: Economic Threats
10.7: Environmental Threats
10.8: Food Threats
10.9: Health Threats
10.10: Personal Threats
10.11: Political Threats
10.12: Conclusion
10.13: Glossary
10.14: References
10.15: Discussion Questions

11: Conclusion - Ideology in the Globalized Future

11.1: Ideology
11.2: International System and Globalization
11.3: Levels of Analysis
11.4: International System, Sovereignty, and the State
11.5: The State
11.6: Globalization - The 4th Level
11.7: Ideology and the Trajectory of the International System
11.8: The Liberal International Order 1945-1991
11.9: The Evolution of Liberal Internationalism at Home and Abroad
11.10: Other Factors - Technological and Climate Change
11.11: Problematization of China - Case Study in Systemic Change
11.12: Conclusion
11.13: Glossary
11.14: References
11.15: Discussion Questions

Index
Glossary
Detailed Licensing
Detailed Licensing

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Program Page

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We selected LibreTexts as our preferred platform because of its commitment to accessibility. In addition to the platform's inherent accessibility, we collaborated with the LibreTexts team to fix any accessibility issues we found.

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2. **Progress checks.** The manuscript was checked at approximately 40%, 60%, and 80% completion to catch and correct accessibility issues in production.
3. **Specialist review.** Once the manuscript was complete, an accessibility expert conducted an accessibility check.
4. **Remediation.** The author and the project manager who conducted the earlier progress checks worked together to remediate the issues identified by the accessibility expert.
5. **Final check.** The resource underwent another full check by the accessibility expert before the book was deemed ready for publication.

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This statement was last updated August 2026

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About the Book

This textbook is the product of the Political Science Department at De Anza College. It is designed to provide the basis for a quarter-long introductory course in Political Thought and Theory for an undergraduate, community college student audience.

There are at least five ways to organize an introductory course on a subject as massive as this. The first and dominant tradition is to survey "the great thinkers" in the Western cannon, ancient and modern -- Plato, Aristotle, Machiavelli, Hobbes, Locke, Rousseau, Kant, Mill, Marx, etc. This is fun and without a doubt "tried and true." Moreover, there are a number of such open-source texts already available, including:

- Vicki Hsueh and Shirin Deylami, eds. *Introduction to Political Theory*
- Noah Levin, ed. *Political Philosophy Reader: An Open Educational Resource*
- Wiki Knights. *Political Philosophy*

A second way is to focus on key ideas, debates, and principles. What is the good society? What is truth? What is justice? etc. Although this is definitely a popular mode for introductory political theory classes, there are no open-source textbooks in this genre.

A third way is to focus on topical and international issues. On this score there are a number of open-source textbooks for consideration including:

- Geoff Andrews and Michael Saward, *Nationalism, Self-determination and Secession*
- Paul Kelly, *Conflict, War and Revolution*
- Geoffrey Kellow and Neven Leddy, eds. *Civic Republicanism*
- James Tully, ed. *Global Citizenship*

A fourth approach is an explicitly anti-racist one that emphasizes the Euro-centrism inherent in the discipline and calls for an openly liberationist approach. There is only one example of this approach we can find, and it is Albert Ponce's, *Political Science 240 -- Political Theory Syllabus: Open For Anti-Racism (OFAR)*. Ponce's class is a very interesting one. And, while we find the anti-racist approach most compelling, his course is designed for semesters and is based on PDF readings available through Canvas.

Fully cognizant of the Eurocentric nature of the discipline and strongly supportive of anti-racism, we focus on major belief systems and/or ideologies in the belief that it will enable students to evaluate and critically engage the full breadth of mainstream political theory. There are a number of political theory texts that focus on ideological belief systems, but only one that is open-source. It is Dr. Valérie Vézina, ed., *Political Ideologies and Wordviews: An Introduction*.

The text that follows is based on a selection of key chapters from *Political Ideologies and Wordviews: An Introduction* making it especially suited to a quarter-length class. What we add in terms of value are summaries, glossaries, discussion questions, and multiple choice exam questions (available for instructors only). We hope you and your students find this textbook valuable.

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About the Author



Bob Stockwell is a retired instructor. He taught at De Anza from 2004 to 2026 and taught courses in American, Comparative, International Relations, and Theory.

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1: INTRODUCTION - THINKING ABOUT POLITICAL IDEOLOGIES

Introduction to Political Ideologies

This text serves as a foundational guide to political ideologies, framing them as structured sets of ideas used to interpret and shape our social world. The source explores various definitions of ideology, contrasting the Marxist view of ideology as a tool for justifying exploitation with a pluralist approach that views competing belief systems as valid perspectives. It introduces the left-right spectrum as a tool for comparing these systems, using the core value of human equality to position ideologies ranging from communism to fascism. Beyond simple policy debates, the text emphasizes that ideologies are dynamic frameworks that evolve over time and influence economics, social structures, and personal identity. Ultimately, the source argues that understanding these "configurations of concepts" is essential for informed political action and for making sense of complex global issues.

Learning Objectives

- Distinguish between the various definitions of ideology, from the "science of ideas" to "false belief" and "configuration of concepts."
- Compare ideologies using the spatial metaphor of the political spectrum.
- Evaluate the strengths and weaknesses of the linear left-right spectrum in capturing modern political divides.
- Recognize the dynamism of ideologies and how they evolve, wax, and wane over time.

1.1: Real Life Examples

1.2: Ideology as Justification

1.3: A Pluralist Approach

1.4: How Ideologies Differ

1.5: Left-Right Spectrum

1.6: Ideologies That Don't Fit

1.7: Left and Right in Canada

1.8: Limits of the Left-Right Spectrum

1.9: Ideologies are Dynamic

1.10: Ideologies Impact Economics, Society, and Politics

1.11: Glossary

1.12: References

1.13: Discussion Questions

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1.1: Real Life Examples

Examples From the Real World

Below are three real-life cases "torn from the headlines," as they say. What is your reaction to these examples? And what reasons can you give for your response?

The Profiteering Drug Company (USA)

"A couple of years before he was convicted of securities fraud, Martin Shkreli was the chief executive of a pharmaceutical company that acquired the rights to Daraprim, a lifesaving antiparasitic drug. Previously the drug cost $13.50 a pill, but in Shkreli's hands, the price quickly increased by a factor of 56, to $750 a pill. At a health care conference, Shkreli told the audience that he should have raised the price even higher. 'No one wants to say it, no one's proud of it,' he explained. 'But this is a capitalist society, a capitalist system, and [with] capitalist rules'" (Desmond, 2019).

Persistent Gender Inequality (Canada)

A major investigative report by *The Globe and Mail* newspaper stated that it has been "fifty years since governments began enacting laws that banned discrimination in hiring, firing and promotions on the basis of sex. Forty years since the federal government made it illegal for employers to fire a woman for becoming pregnant. Thirty years since women overtook men in university graduating classes. And it's been 10 years since the wage gap budged in any significant way, progress has stalled. By almost every metric, they continue to lag generations behind men" (Doolittle and Wang, 2021).

Ethnic Persecution (China)

Reports from China's Xinjiang region indicate that atrocities are being systematically committed by the Chinese government against the mostly Muslim Uighur community. The BBC reports that "as well as interning Uighurs in camps, China has been forcibly mass sterilising Uighur women to suppress the population and separating Uighur children from their families. The Australian Strategic Policy Institute found evidence in 2020 of more than 380 of these 're-education camps' in Xinjiang, an increase of 40% on previous estimates...People who have managed to escape the camps have reported physical, mental and sexual torture – women have spoken of mass rape and sexual abuse.... In December 2020 research seen by the BBC showed up to half a million people were being forced to pick cotton. There is evidence new factories have been built within the grounds of the re-education camps" (BBC, 2021).

What Is Your Response and Why?

Consider your response to each case. Do you find yourself reaching for ideas such as fairness, equality, freedom, justice, human rights, and nationhood in articulating your response? If so, then you are beginning to speak the language of political ideology.

As Michael Freeden has argued, a political ideology is a "configuration of concepts" (Freeden, 1996) – a set of ideas we use to make sense of our political and social world. Each political ideology interprets that world (describing it in certain ways) and either justifies or challenges the prevailing state of affairs in light of a set of ideas about how things ought to be. This will be key to our definition of political ideology. But before getting to that, let's take a quick look at how scholars before us have approached the subject.

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1.2: Ideology as Justification

Origins

The origin of the term "ideology" is often traced back to Antoine Destutt De Tracy (1754–1836). De Tracy used it to denote a "science of ideas" that, he thought, would help us understand *why* people believe what they believe. He hoped this science could then be used to root out error and superstition – wrong beliefs, in other words. If we can figure out the causes of such errors, we might be able to eliminate those causes and build a more rational society.

Living as we do in a time of accusations of "fake news" and bizarre conspiracy theories like QAnon, De Tracy's project might seem tempting. His use of the term "ideology" is not, however, what we typically mean by the word. The project has another problem – that of knowing what is "correct" versus a false belief. De Tracy seems to have thought this was evident, but most philosophers will tell you that it can be a challenging matter.

Instead of embracing De Tracy's definition, many after him have focused on the "false belief" element and defined ideology as a particular category of false belief. In its more sophisticated forms, this approach sees ideology as the belief system that conditions us to accept and support a specific way of organizing society, even though it may not be in our own best interest.

Ideology as Justification

Ideology, from this perspective, is what justifies the economic, political, and social order we live in. If that order is corrupt, then ideology is a key part of the rip-off – a way of deluding exploited people into thinking their exploitation is necessary, normal, or maybe even fair and reasonable. This view of ideology is most closely associated with Karl Marx (1813–1883) and Friedrich Engels (1820–1895), the founders of what we now call (ironically, perhaps!) the ideology of Marxism (see chapter V in this textbook). They analyzed and critiqued the capitalist economic system that was enveloping Europe in the 19th century and, in some form, continues to dominate the globe today. For Marx and Engels, the capitalist economy is fundamentally exploitative: it privileges one class, namely those who own capital and businesses (i.e., the capitalist class, also called the *bourgeoisie*), and subordinates everyone else – particularly the workers, or *proletariat*, who have no choice but to sell their labour to the owners of the businesses. But why would anyone other than capitalists support such a system? Why would you, as an exploited worker, believe this system is acceptable, even necessary?

The answer, Marx and Engels suggest, is that you have been deluded by ideology. "The ideas of the ruling class are in every epoch the ruling ideas," they write (Marx and Engels, 1932). We have been conditioned by these "ruling ideas" to think that private property is an important freedom, even a "human right," and that competition and money-making greed are "natural" human traits. We might even think we live in a society that is free because, say, no law stops us from doing what we want much of the time, or that people in our society are equal because all have the same rights under the law. In fact, Marx and Engels suggest our freedom is empty. As a worker, you lack the resources to live a truly fulfilling life and you spend most of your time being controlled by the bourgeoisie, who exploit your labour for their own profit. Nor are you in any meaningful way equal to the capitalists. They have far more power and wealth than you, and the law systematically favours their interests, not yours.

Ideology thus masks relations of domination and subordination, disguising those relations in languages of justice, nature, and necessity. And if ideology is a false belief that props up unjust social arrangements – the domination of the ruling groups over the rest – then there seems to be little point in studying ideology in depth. Wouldn't we be better off focusing our attention on understanding those relationships of domination and how to change them? As Marx famously asserted: "philosophers have merely interpreted the world; the point, however, is to change it" (Marx, 1888).

Gramsci's Hegemony

Scholars of ideology who work in the Marxist tradition remain fascinated by the mechanisms our society uses to get people to accept its structures and norms such that they seem normal, necessary, and maybe even natural. However, they tend not to share Marx's (early) view that those mechanisms are ephemera best set aside by clear-eyed analysts. The Italian Marxist Antonio Gramsci (1891–1937), who was less confident than Marx and Engels that ideas are of secondary importance to economic relationships, used the term "hegemony" to describe a belief system that is so dominant that alternative ways of thinking are

almost inconceivable. Capitalism becomes a truly hegemonic system when people overwhelmingly see its way of doing things as "common sense." For Gramsci, such hegemonic beliefs are reproduced by all sorts of social mechanisms. Teachers, thinkers and journalists propagate them and influence others to believe in them; but so, we may infer, do less obvious sources such as movies, novels, music, churches, and the family. Gramsci was interested in counter-hegemony: how to get people to think and act differently? Meaningful change could be fostered, in part, by changing how people think.

Later thinkers within the rich and complex scholarly traditions known as "Western Marxism" and "Critical Theory" have explored the ways in which support for capitalism is generated through the institutions, psychology, practices, and discourses of daily life (see Leopold, 2015 and McNay, 2015), usually with an eye to the possibility of radical resistance. Common to these traditions is the conviction that capitalist market economies are faulty ways of organizing our affairs. We would do better to challenge, destabilize, and (hopefully) transcend this economic system and its cognate political and social structures, replacing them with something else. (What might that be? See chs. 5, 6, and 12 in the present book for some ideas). But writers in these traditions have become gradually less certain that ideology is something we can leave behind. Perhaps a society freed of exploitation and domination (assuming this to be possible) would still need "ideology" in the sense of a widely shared set of beliefs that help to make the society run. Those beliefs, however, would no longer be geared to propping up an unjust set of social arrangements – surely a great gain, if it could be achieved (e.g., Leopold, 2013).

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1.3: A Pluralist Approach

Introduction to the Pluralist Approach

So we do not have to define ideology as delusion or error. Nor, in fact, are we required to follow Marxist and "critical" scholarship in their radical or revolutionary critique of society. An alternative approach is to see each ideology as one (more or less) plausible perspective of the social world that is challenged by *other* plausible perspectives. Studying ideology then becomes the exploration of a range of systematic and reasonably coherent options for thinking about social and political life. That, broadly speaking, will be the approach taken in this book.

Now, this does not require us to believe that each ideology is equally plausible. Indeed, this would be impossible, since specific ideologies themselves disagree on fundamental points. But it does mean that we should be open to the idea that no one ideology necessarily tells us everything we need to know about social and political order.

We can call this approach, which is open, in principle, to various ideological perspectives, a "pluralist" approach. It does not assume there is one best answer to our social dilemmas and is willing to consider many answers, none of which may be wholly right or wholly wrong.

Defining Political Ideology

Most textbook definitions of political ideology proceed more or less in this vein (e.g., Heywood, 2021; Ball, Dagger, and O'Neill, 2020; Wetherly, 2017; Geoghegan and Wilford, 2014; Sargent, 2008). And they generally agree that a political ideology will contain the following elements:

1. A specific description of the social world we currently live in. The key here is not to assume that the "reality" of our world just obviously imprints itself on our brains. Rather, we need to interpret – to make sense of – the swirling mass of social phenomena confronting us, distinguishing between what is more and less important and the meaning of the important stuff. One contribution of ideology is in helping us do this (Freeden, 2003). There are different ways of making sense of our social world, and different ideologies tend to focus in on a particular unit of analysis – the key to the ideology's story – which unlocks its preferred understanding of society. For example, liberalism tends to see society as a collection of individuals and to elevate the individual to the highest importance. Socialism, on the other hand, emphasizes that individuals are in fact organized into social and economic classes (capitalist and worker, rich and poor), that those classes are what really shape our lives, and that the social order is constructed to the advantage of one class over the others. Therefore, class is what we really need to understand if we wish to grasp how society works. Feminism (see chapter 13), meanwhile, emphasizes that we live in a gendered society and that power is distributed in a way that favours one gender (heterosexual men) over others. This is what we really need to understand, then, if we want to grasp the realities of our social world. Nationalism stresses above all that human beings are grouped into nations; this is the overarching fact we need to understand if we want to properly comprehend our social world. And so on. Thus, each ideology offers a rather different view of how we should understand the society in which we find ourselves.
2. An evaluation of the social world we currently live in. An ideology is not exhausted by its description of society; it also offers resources for assessing it. Should the world be this way? Why or why not? Continuing with an example from the previous paragraph, when feminists describe the world as marked by an imbalance of power between genders, they generally do not stop there. Rather, they go on to argue that it could be, and should be, otherwise. No gender should be advantaged over others. And every other ideology will similarly hold out the possibility of a critical assessment. Liberals will be interested in asking whether individual freedom and equality are optimally realized in our society, Marxists in criticizing class inequalities (and maybe even in condemning the existence of social class itself), nationalists in assessing whether a nation is fully realizing its identity and its autonomy, and so forth.
3. A program of action. Having described the world and evaluated it, an ideology will also typically involve some set of ideas about "what is to be done," as the Marxist revolutionary Vladimir Lenin once put it. The program of action will seek to address problems identified by the ideology's evaluation of the social order. If our society is full of unearned legal privileges that discriminate between individuals, then liberals, believing that all human beings should be equal before the law, will argue for the abolition of this discrimination. Socialists, meanwhile, have argued that the exploited workers need to rise up and seize the power and wealth unjustly hoarded by capitalists – either through revolution or through the election of governments that will impose heavy taxes on wealth and redistribute those resources to the workers and the poor. Feminists have proposed a

range of possible actions (from breaking down gender roles to dissolving gender itself) all with an eye to the destruction of gendered privilege. These are merely examples; each ideology covered in this book will have its own preferred prescriptions for restructuring our social world.

Political ideologies always, therefore, combine ideas about politics with an emphasis on action. We may thus define a political ideology as a configuration of concepts that describes and assesses the social world with an eye to mobilizing people for action. Every ideology explored here is a widely shared belief system containing the three ingredients sketched above.

The Pluralist Approach

The pluralist approach to the study of political ideology favoured here may be traced back to the work of German sociologist Karl Mannheim (1893–1947). Mannheim agreed with Marx and Engels that ideology reflects the interest of social classes and groups, but he broke with them in emphasizing that society contained a range of such groups, each of which would translate its interests into the language of ideology. This opens the door to studying a wider array of ideologies as opposed to reducing ideology to the "ideas of the ruling class." Mannheim nonetheless retained a Marxist understanding of ideology as a mask for social interests. He also suggested that a special class of "intellectuals" could transcend ideology and arrive at a more objective understanding of society (Mannheim, 1997).

While it would be naïve to see political beliefs as utterly disconnected from social interests, a pluralist approach will not reduce ideology to specific group or class interests. People are drawn to ideology for a host of reasons, including psychological ones (e.g., Haidt, 2012). And a pluralist approach need not assume that any individual or any society can "transcend" ideology.

At a bare minimum, we cannot do without debatable views on the contested concepts that make up ideologies. Perhaps no one political ideology explored in this book will seem like a perfect fit for your own ideas and intuitions about society, but you cannot have no opinion at all on questions of justice, freedom, community, order, human nature and dignity, and so on. (To see this, ask yourself whether it is possible to see no moral difference at all between a person selling ice cream and a police officer brutally strangling a suspect to death). Political ideologies weave such key concepts together into more-or-less coherent and inspiring visions of social life. Exploring these invites each of us to inquire into what we ourselves really believe and how, or whether, or own political beliefs fit together.

What separates a political ideology from a utopian fantasy is the conviction that it is realistic to think that we can change society to make it align more closely with the ideology's preferred vision. This does not mean that a believer of a given ideology thinks such change will be easy or even that it will happen within their own lifetime; but they must believe that their preferred vision of the social world is possible for human beings to actualize and sustain. If they did not believe this, then they would hardly be willing to pour so much energy into helping that world come into being (unless they were crazy).

Indeed, ideologies have been so compelling that many thousands, indeed millions, of people have died in their name. With their emphasis on action, political ideologies always have an eye to mass mobilization, building support for their preferred vision of the world and galvanizing people to bring it to fulfillment.

This is one difference between political ideology and the more rarified domain of political theory or political philosophy. The latter are specialized scholarly pursuits committed above all to intellectual rigour, while the former require an ability to appeal to a wide range of people. Thus, Marxists have fought revolutions and wars in the hope of building a classless society. Women have marched and struggled for gender equality over generations – often, as was the case with the Suffragettes, paying a high price in health and happiness. Countless soldiers have fought and died in the name of their nation. When it comes to political ideology, then, "ought" implies "can:" to say that we should move our societies in a specific direction means that doing so is a realistic, viable possibility.

One recurring temptation, given these dramatic truths, is to see political ideology as necessarily doctrinaire, narrow-minded, and extreme. The blinkered "ideologue" is then contrasted with the "pragmatic" person who assesses each situation without preconceived ideological biases and addresses each case on its own merit (e.g., Sartori, 1969). Our reply is that this contrast is untenable. One can't approach social and political issues without some sort of preconceived ideas about what is more or less important and more or less valuable; otherwise, we would not know whether to focus our attention on a piece of lint on the sidewalk or massive riots in the streets. Meanwhile, "to judge something 'on its merits' implies preposterously that self-evident merits leap out of concrete cases for all to see" (Freeden, 1996). In fact, determining "merit" almost always involves us in debatable judgements. Someone might believe it is obvious that governments need to promote economic growth – that this is a self-evident, objectively desirable goal. The problem is, there are many thoughtful environmentalists who reject economic growth altogether as an ultimately unsustainable model. Who is right? Common sense cannot tell us. We are thus enmeshed in ideological argument.

Calling ourselves “pragmatic” rather than “ideological” ultimately occludes our specific ideological commitments and convictions.

Some ideologies may indeed be more rigid, demanding, and “extreme” than others. But it would be an error to think that political ideology as such demands rigidity and fanaticism. In other words, while it may be hard to find a reasonable, moderate fascist, one can indeed be a reasonable liberal, conservative, socialist, feminist, nationalist, anarchist, or Confucian.

Tilting Toward Moderation

A pluralist approach tends to tilt us toward moderation precisely because of its openness to the possibility that more than one political ideology may contain valuable insights into our social situation. This can be true even when those insights prove irreconcilable:

> Values may easily clash within the breast of a single individual; and it does not follow that, if they do, some must be true and others false. Justice, rigorous justice, is for some people an absolute value, but it is not compatible with what may be no less ultimate values for them—mercy, compassion—as arises in concrete cases…The notion of the perfect whole, the ultimate solution, in which all good things coexist, seems to me to be not merely unattainable—that is a truism—but conceptually incoherent; I do not know what is meant by a harmony of this kind. Some among the Great Goods cannot live together. That is a conceptual truth. We are doomed to choose, and every choice may entail an irreparable loss. These collisions of values are of the essence of what they are and what we are (Berlin, 1998).

An outlook of this sort tends to nourish humility and empathy even toward views with which we thoughtfully disagree. That said, a moderate, reasonable person may still be a person of conscience and conviction. Faced with social evils – despotic tyranny, say, or racist oppression – we may conclude that strong and uncompromising action is required. Reasonable people can, and often have, put their lives on their line for their deepest political beliefs.

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1.4: How Ideologies Differ

Differences that Make a Difference

Different ideologies are built on different concepts and vary in the way they organize and prioritize those concepts. It is not that there is no overlap between the concepts used by one ideology and those used by another. On the contrary, most ideologies affirm ideals such as equality, freedom, justice, order, and community. Nonetheless, they often define key concepts differently. Such concepts are "contested," meaning that there is no single, universally shared or "correct" definition of what they mean. Rather, each such concept tends to have a range of possible meanings associated with it. If we learn that nationalism, socialism, and liberalism all have a commitment to "freedom," therefore we cannot stop there. Rather, we have to inquire into what they mean by this term, and we must be prepared for the possibility that they use the same term to mean somewhat different things.

Different ideologies often prioritize key concepts differently. For instance, both liberalism and socialism endorse certain ideals of freedom, equality and community. But many would argue that socialism gives a degree of priority to equality and community that is not usually found in liberalism. Similarly, both socialism and liberalism recognize the value of the human individual; liberalism, however, gives this principle pride of place, while socialism tends to put greater emphasis on collective categories such as social class.

Sometimes ideologies are completely divergent in their key concepts. For example, fascism utterly rejects the principle of human equality. In this, it is deeply different from rivals such as liberalism, socialism, or feminism. Other times, an ideology will highlight a concept not shared in any important way by its rivals. Environmentalism thus makes the flourishing of the natural world absolutely central to its vision of social and political order, while no other ideology does this to anywhere near the same degree.

These, then, are some important ways in which ideologies can vary. But ideologies have similarities as well as differences. This brings us to the problem of how to generalize about the relationships between various ideologies.

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1.5: Left-Right Spectrum

The Left-Right Continuum

When people think about the similarities and differences between particular ideologies, they are often drawn to a spatial metaphor: the left-right "spectrum" or "continuum." This left-right spectrum – an imaginary line, in effect – is an organizing device that helps us sort out how different ideologies relate to each other. A person is "on the left" of this line if their views reflect those of left-wing ideologies, and they are "on the right" if their views reflect those of right-wing ideologies. But what do these labels mean?

The classification of ideological argument into a left-right spectrum has its origins in the French Revolution. This developed from fairly moderate beginnings in 1789 into a violent, seething cauldron of ideas for rebuilding society from the ground up before culminating in dictatorship by the late 1790s. Some regard the French Revolution as ground zero for political ideology as we know it – the moment when the intoxicating idea that we could comprehensively refashion our social world branded itself irrevocably upon the modern imagination. And in terms of the ideological spectrum:

> [m]ost scholars trace the origins of the words "left" and "right" to the seating arrangement of the Estates General in the years leading up to the French Revolution...In the Estates General, radical democrats and their sympathizers sat to the left of the king, supporters of the clergy and the aristocracy on the right (Cochrane, 2015).

Opposing Views on Equality

This gives us a hint as to what the left-right distinction is driving at. Indeed, there have been many answers to this question (e.g., Cochrane, 2015; Noël and Thérien, 2008; Bobbio,1996; Laponce, 1981), but one convenient approach is to say that the two poles represent opposite views about human equality. Thinking about the ideological spectrum in this way can help capture much about how we actually use the terms "left" and "right."

At the furthest point on the left of the spectrum, then, fall the most robustly egalitarian options available to modern political thought. To be "egalitarian" is to believe in the surpassing importance and desirability of equality in human relations. For the extreme egalitarian, human beings should have:

- equal rights under law
- equal power and standing in the community
- and approximately equal possessions (insofar as they have possessions at all, as opposed to everything being owned in common).

A society that robustly realizes equality on all three of these dimensions may be described as communist or "anarcho-communist." Don't worry, we will unpack what these labels mean in greater depth in later chapters. All we need to know for now is that these far-left ideologies imagine a society in which there would be no state, no government, no coercive power (such as police forces), minimal (or no) private property, and no exploitation. We might, say, all live in small communes and share resources among ourselves. That is about as far left as one can go – because it is as ambitiously egalitarian as one can go.

At the further point on the right of the spectrum would come the most adamantly inegalitarian options available to political thought. These would entail a rejection of equal rights, equal power and standing, and equal possessions. For example, to believe in dictatorship is to say that one person, or some small group of people, are entitled to rights and privileges not available to others – in this case, the right and privilege to govern and make decisions for the whole society. Power in dictatorships is not shared, but completely and (in theory) permanently concentrated in a few hands. And the ideology of fascism (see Box 1.1) argued explicitly that the superior man – and it was always a male – must rule and wield absolute power. Fascists also argued that some groups of human beings should dominate others: stronger nations or races should subordinate the weaker. Finally, fascism rejected socialist ideas about wealth being equally distributed. Massive political inequality, and massive material inequality, were unapologetically baked into the ideology, even as its adherents spoke about a mystically unified nation. This extreme inegalitarianism means that it makes sense to position fascism as an ideology of the "far right."

Fascism

Fascism emerged as an explicit ideological option following the First World War in Italy when Benito Mussolini led a movement that evolved into the National Fascist Party (founded in 1921). Fascists eventually rose to power in Italy, Germany, Hungary, Spain, and elsewhere, and by the 1930s fascism was exerting considerable influence worldwide. Historians still debate whether non-European countries such as Hirohito's Japan prior to 1945 or the 1930s Getúlio Vargas regime in Brazil were fascist states.

Fascism upheld an extreme form of nationalism (often called 'ultranationalism') emphasizing the absolute duty of the individual to the nation and advocated an authoritarian, indeed totalitarian, state. The state was understood to be a vehicle for national mobilization, and the individual was understood to be properly one with the nation. For fascists, then, to limit the state's power was ultimately to limit oneself. Further, arguing for such limits was a sign of pathology speaking to either self-loathing and cowardice (a failure of self-assertion) – or corruption: a shiftless desire to weaken the national power for one's own selfish interests.

Fascists believed that human inequality was "immutable, fruitful and beneficial" (Mussolini, 1932). Within the nation, a superior elite headed by a charismatic leader must wield absolute power. Otherwise, fascists thought, the nation would degenerate. Similarly, stronger nations should rule and subordinate inferior ones; otherwise, humanity itself would degenerate. Fascists were accordingly militaristic and saw war as heroic and something to be enthusiastically embraced (Mussolini, 1932).

Economically, fascism presented itself as an alternative to both liberal capitalism and socialism. Unlike socialism, it left economic ownership largely in private and corporate hands; unlike liberalism, it proposed to coordinate economic production to ensure that it served the purposes of the state and to oversee a collaborative relationship between labour and capital. In practice, fascist states often promoted growth through massive military buildup and destroyed any critical labour voices (e.g., Passmore, 2002).

Nazi Germany can be argued to represent a distinct variant of fascism because of the especially heavy emphasis it placed upon race (e.g., Passmore, 2002). In Germany, the 'nation' was understood to be a genetically pure racial group entitled to subordinate inferior races and, indeed, eradicate them altogether. If the logic of mainline fascism tended toward war, the result of Nazism was a colossal program of genocide – the Holocaust – in which approximately six million Jews and up to half a million Roma were herded into concentration camps, where they were enslaved, tortured, and murdered.

Fascism proved extremely short-lived as a mainstream ideology, thriving for a single generation only. Its overt influence collapsed after the total defeat of the Axis powers in the Second World War. However, it would be ill-fated to say that fascism and its values have entirely disappeared. In Europe, for example, some argue we are seeing a resurgence of fascist ideologies with the rise of neo-fascist parties and movements critical of immigrants and ethnic minorities. Fascism breeds in conditions of crisis, uncertainty and disorder; it is not surprising that some parties employ themes of 'organic unity' or 'pure 'blood' in contexts where significant numbers of people fear demographic, economic, and technological changes fueled in part by globalization.

The Left-Right Continuum Elaborated

Table 1.5.1:The Absolute Ideological Spectrum

Communism	Socialism	Socialism	Liberalism	Liberalism	Conservatism	Libertarianism	Fascism
Anarcho-communism	*Marxist-Leninist, Maoist*	*Social democracy, democratic socialism*	*Reform liberalism*	*Classical liberalism*		*Anarcho-capitalism*	
LEFT *Egalitarian*	←	←	←	**CENTER**	→	→	**RIGHT** *Inegalitarian*

Table 1.5.1 shows that, between the two extremes of communism and fascism, lies a group of more moderate ideological options. Democratic socialism, for example, slots "left" because it advocates for significant (not absolute) redistribution of wealth from rich to poor. This moves it closer to equal possessions, but not all the way there, even as it retains a belief in some degree of equal power and standing within the community via equal rights to political participation. Liberalism, for its part, is a very varied ideology, but by and large it is less emphatic about the redistribution of wealth and not quite so staunchly egalitarian as democratic socialism. It occupies the centre of our spectrum. Conservatism, meanwhile – at least as understood in the second

half of the 20th century – tends to oppose the redistribution of wealth, favouring a higher level of economic inequality, while still (mostly) insisting on equal rights and equal rights of participation. It also tends to defend traditional social hierarchies, for instance, in the realm of gender relations and cultural identities. And so it falls to the right of liberalism. Libertarianism and anarcho-capitalism would unleash vastly higher levels of material inequality by reducing the state to a bare minimum or abolishing it altogether and organizing human affairs largely by market mechanisms. They can thus be placed further right still. Nevertheless, these configurations retain a commitment to equal legal rights. At the furthest point – fascism – this commitment drops entirely away, as we saw.

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1.6: Ideologies That Don't Fit

"Awkward" Ideologies

Some ideological options do seem to be awkward fits for the left-right binary. Nevertheless, we can use the contrast between egalitarianism and inegalitarianism to help categorize them. Feminism, for example, seeks to break down gender hierarchies; this concern for equality is reflected in the tendency to see it as broadly of the left, even if not every self-defined feminist can be so classified. Religious fundamentalism tends to heavily favour traditional identity hierarchies (particularly in relation to gender and sexual orientation), and so it is not surprising to find it typically classified as belonging on the right. Environmentalism is especially difficult to classify because its primary concern is less focused on human-to-human relations than human relationships with the natural world. Environmentalism is thus an unusually open-ended ideology in terms of how it envisages social organization. If an optimal human-natural relationship can be best achieved via hierarchical social arrangements, then in principle some environmentalists might endorse those arrangements, which would put them on the right. On the other hand, the environmentalist desire to give nature and animals greater standing in human affairs pushes them toward a kind of egalitarianism – one that places human beings and the natural world on a more equal moral and political footing. In practice, most environmentalists support egalitarian measures for human beings as well, which is why they tend to be classified as on the left.

Some ideologies encompass both strongly left- and right-wing variants. Nationalism and populism are cases in point, as we will see. Anarchism offers a particularly interesting case of this. One of its major variants, anarcho-communism, falls on the extreme left, while the other, anarcho-capitalism, lands on the far right. This is because the former imagines a radical material equality (shared possessions, communally organized) and the latter a radical material inequality (completely unregulated capitalism). What qualifies both as anarchist is their rejection of all forms of coercive, non-voluntary social coordination and government. All forms of anarchism therefore have a strong bedrock commitment to human equality: no one should be able to compel anyone else to do anything. But anarcho-capitalism leaves room for massive inequalities of wealth and real-world hierarchies – e.g., hierarchical chains of command within corporations – while anarcho-communism insists on equality in all spheres of life and in all senses of the word.

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1.7: Left and Right in Canada

The Ideological Continuum in Canadian Politics

The preceding has explored what we might call an absolute ideological spectrum. It encompasses all the major ideological options of modern politics. However, since the Second World War, the day-to-day politics of most liberal democracies has tended to work within a much narrower band of possibilities. For example, communism and fascism exist only at the very fringes of Canadian political life. Canada's Marxist-Leninist Party received a paltry 4,124 votes out of 18,350,359 votes cast in the 2019 federal election (Elections Canada). This is fewer than half the votes received by the satirical Rhinoceros Party, and only a fraction of the total number of spoiled ballots! Meanwhile, there is no self-defined fascist party in Canada at all. Instead, political debate in Canada clusters very heavily around the centre of the absolute ideological continuum. Liberal ideology is thus at the core of Canadian politics, with support shading off toward the left in the form of very moderate social-democratic beliefs on the one hand and a largely moderate conservatism on the right. Indeed, seen from the perspective of the absolute ideological continuum, most of the heated debates within Canadian life – e.g., should Canada adopt a national Pharmacare program? A carbon tax? A pipeline? A higher or lower level of government deficit? – concern minor policy disagreements within a broadly shared allegiance to liberal-democratic capitalism and a global order defined by sovereign states or nations. So when we talk about left and right in Canadian politics, we refer to something much more confined than the absolute ideological spectrum. And something similar holds for politics in most contemporary liberal democracies, most of the time.

At this local level, the political centre – meaning the median point between the most relevant political polarizations within a particular society – does tend to shift leftwards or rightwards as time passes. The political mainstream in Canada in the 1990s hewed further to the right in its commitment to balanced budgets and high tolerance for material inequalities than did the political mainstream of the 1960s, or, arguably, that of the 2020s. And Canada is usually thought to lean further left, on the whole, than the United States; yet many European countries, especially the Scandinavian ones, show much stronger commitments to the redistribution of wealth and material equality than Canada. What exactly counts as the "centre" of mainstream politics, then, varies from society to society, even as each of those societies leans further left or right, and back again, as it moves through time.

Table 1.7.1*: The Local Ideological Spectrum - Canada*

←	←	LIBERALISM	→	→
Marginal options	**New Democratic Party, Green Party**	**Liberal Party**	**Conservative Party**	*Marginal options*

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1.8: Limits of the Left-Right Spectrum

Important Caveats

So the left-right spectrum can be thought of as a meaningful, if very general, way of categorizing ideologies. It may be unwise to insist that all ideological disagreement can be crammed into the left-right binary or, at the very least, we should concede that this is challenging to do.

One example of an issue that is tricky to slot into the left-right continuum is what is sometimes called the debate between "Anywheres" and "Somewheres" (Goodhart, 2017) – also referred to as "Open" versus "Closed" (e.g., Economist, 2016). Those who focus on this debate argue that a major fault-line exists between people who are fiercely loyal to particular communities and traditions and those who are more mobile, comfortable with diversity, and "global" in outlook. The former tend to back projects like Brexit and politicians like Donald Trump who want to strengthen borders, while the latter tend to support globalization and are more "multicultural" in orientation. On its surface, anyway, this debate seems to have little to do with equality in any sense, and so fails to fit into the left-right framework as we sketched it out above.

That said, one could argue that, in subtler ways, it does fit. For example, the politics of the "Somewheres" is often laced with worries about immigrants, "outsiders," and concerns that historically dominant identities are losing ground to others. In this sense, their politics may represent an attempt to privilege traditionally dominant cultural identities over other identities – a move in the "inegalitarian" right-wing direction. Meanwhile, the politics of the "Anywheres" often entails a rejection of traditional cultural, gender, and sexual hierarchies and can even extend to support for completely open borders and a view that it is unjust to treat citizens and non-citizens differently – a move in an "egalitarian" left-wing direction.

All the same, rather than doing a lot of heavy lifting in order to make every last issue fit within the left-right continuum, we may prefer to simply accept that the left-right structure does not perfectly capture everything about politics. And that's perfectly fine: it's not necessary to assume that any single belief system or conceptual structure must tell us the totality of what we need to know or understand about the world. Note, however, that those who find a single left-right binary too limiting have developed other options, such as the Political Compass, which posits a four-quadrant grid as a better way of categorizing ideological disagreements. Try clicking on this link to take a test and see where you fall on the Compass.

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1.9: Ideologies are Dynamic

The Lives of Ideologies

Ideological debate is never static. Any given ideology will enjoy historical periods of greater or lesser popular impact. Fascism may have had progenitors in late 19th-century and early 20th-century conservatism, but it is not much of a simplification to say that it exploded onto the European scene after the First World War and utterly evaporated as a mainstream option following the crushing defeat of the Axis Powers in World War Two. Its heyday barely lasted 20 years. To take a more durable example, socialism was seen as a primary – often the primary – challenger to liberalism for most of the 20th century. Many people believed that the forces of history were on the side of socialism and that its triumph was inevitable. Yet, by the 1990s socialism had become widely seen as passé, with liberalism standing triumphant (Schwartmantel, 2008). Only in the 2010s did socialism resurface as a respectable option in many countries, with influential politicians such as Bernie Sanders and Alexandria Ocasio-Cortez explicitly defining themselves as "democratic socialist." So socialism went from being pegged as the likely historical victor in an ideological battle with liberalism to spending a generation in the political wilderness.

Similarly, anarchism went from being a popular option in radical circles in the late 19th century to almost completely marginal after the Second World War. Meanwhile, liberalism, perceived as utterly dominant and practically unchallengeable from 1990–2010, is now thought by some to be losing influence, perhaps corroded from the left by a loose semi-ideology of "social justice," and on the right by illiberal populism.

Thus, specific ideologies wax and wane in terms of their influence over mainstream politics. Equally important – though sometimes harder to grasp – is that ideologies themselves are dynamic and changing phenomena. What counts as mainstream thinking within any given ideology shifts over time. Yes, it is possible to speak about a core set of concepts and beliefs that make a given ideology what it is; each chapter of this book will include a list of such core beliefs. Nevertheless, certain concepts give way before others within an ideology as it develops.

19th Century (Il)Liberalism

An example may help. The ideology of liberalism (as we will discuss in the next chapter) is associated with many concepts, including individualism and individual liberty. But for 19th-century liberals, human progress was an equally fundamental principle, and for these liberals it seemed obvious that some societies and cultures were further down the path of progress than others. In fact, they believed that some cultures were so hopelessly "backward" that:

- it was entirely justifiable for those societies to be ruled by more advanced ones so that they may be lifted out of backwardness; and that
- it would be a good thing if some backward cultures ceased to exist altogether, and instead be assimilated into the norms, beliefs, languages, and practices of more advanced societies.

John Stuart Mill, probably the most influential liberal thinker of the 19th century, believed precisely these things. This sort of thinking played a tragic role in shaping Canada's policy toward indigenous peoples. These peoples were perceived to be in need of "civilizing" and thus were denied equal civil and human rights; ultimately, they were subjected to brutal policies of forced assimilation – which we now regard as genocide.

Today's liberals tend to be appalled by such views and embarrassed that earlier generations of liberals subscribed to them. This particular understanding of progress, then, was once a key component of liberalism but is no longer. Its influence has receded dramatically since the end of the Second World War, when the horrors of Nazism revealed the ultimate terminus to which such thinking leads. In short, what counts as mainstream liberal thinking has changed over time, even if important ingredients in the liberal recipe remain in place (which is why we can plausibly categorize people from different eras as "liberals").

Similar historical shifts can be observed in other ideologies. Ideologies, then, are mutable – best conceived as dynamic, living, evolving traditions, which each generation alters and redefines in light of its needs rather than as completely fixed and unchanging sets of ideas.

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1.10: Ideologies Impact Economics, Society, and Politics

Economic, Social, and Political Aspects

You may have noticed that many of the ideas attributed to ideologies so far go well beyond the kinds of questions of government policy we might see discussed in our news feed. Political ideology generally takes a much broader approach to 'politics' than just the question of what governments should do (although it is usually interested in that too). Political ideologies harbour views on such sweeping matters as what form of economic organization is best; how genders should relate, and whether gender is a useful category at all; how human societies should deal with the natural world; and whether social change should be resisted, adopted only gradually, or embraced with revolutionary fervour. Ultimately, indeed, all important questions about social power can be dealt with under the banner of political ideology (e.g., Eagleton, 1991; Schumaker, 2008).

That said, most ideologies focus on a limited range of core concepts and build their vision around them. But none are constrained by a need to focus only on the actions of governments.

A final point. You may have noticed that political parties often use labels that align with the names given to political ideologies. Canada's two largest national parties, the Liberal and Conservative parties, are great examples of this. This can lay a trap for the student of political ideology. We should not assume a tidy correlation between the beliefs and values expressed by a political party and those associated with a political ideology.

Think about it this way. Political parties are organizations that seek to contest and win elections. Doing this means advocating for principles and policies that appeal to large numbers of voters. And this in turn means a party may or may not align itself neatly with a given set of ideological principles at any given time. If ideological conservatism is not especially popular at a given moment, a Conservative Party may, therefore, find it convenient to deviate from conservative principles in order to get elected. And it would be a mistake to look at such a party for guidance as to what the ideology of conservatism means.

Of course, analysts cannot define "conservatism" (or any other ideology) without any reference to what people who call themselves conservative actually believe. As we saw above, ideologies are not static. They evolve over time, as the beliefs of real people change over generations. But the point here is that, at any given moment, we should not assume that any particular political party aligns perfectly – or at all, really – with any particular political ideology. The extent to which a party (or person) aligns with the descriptions of ideologies provided in this book should be seen as a matter for investigation, not a given.

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- **Anarchism:** The rejection of all coercive government. **Anarcho-communism** seeks radical equality and communal sharing; **Anarcho-capitalism** allows for radical inequality and corporate hierarchies.
- **Bourgeoisie/Proletariat:** The Marxist categories for the capitalist class (owners) and the working class (laborers), respectively.
- **Contested Concept:** A term (like "freedom") with no single, universally shared definition.
- **Egalitarianism:** The belief in the desirability of equality across three dimensions: equal rights, equal power/standing, and approximately equal possessions.
- **Fascism:** A far-right ideology emphasizing ultranationalism, totalitarianism, and the belief that human inequality is "immutable, fruitful, and beneficial."
- **Hegemony:** A belief system so dominant that alternative ways of thinking are nearly inconceivable. Example: The way capitalist "common sense" makes us view private property as a natural right.
- **Heuristic (Local vs. Absolute Spectrum):** An organizing device or metaphor used to categorize beliefs. Note: The local spectrum shows the "center" of a specific society, while the absolute spectrum shows all modern ideological options.
- **Inegalitarianism:** The rejection of human equality, often advocating for concentrated power (as in Fascism) or the acceptance of massive material disparity.
- **Political Ideology:** A configuration of concepts that describes and assesses the social world to mobilize people for action.
- **Pluralist Approach:** An analytical perspective treating various ideologies as plausible options rather than assuming one is "correct." Why it matters: It fosters humility and empathy toward disagreeing views.
- **Utopian Fantasy:** A vision of society perceived as unrealistic. Ideology, by contrast, must adhere to "ought implies can"—the belief that the vision is actually achievable.

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1.13: Discussion Questions

1. Extreme egalitarianism involves equal legal rights, equal power, and approximately equal possessions. Which of these do you believe is the most challenging for a modern liberal democracy to achieve?
2. Does the prospect of replacing our current economic structures fill you with fear (a traditionalist/conservative reaction) or confidence (a radical/egalitarian reaction)?
3. Identify the unit of analysis for Liberalism, Socialism, Feminism, and Nationalism. How does focusing on the "individual" vs. the "social class" change how you view poverty?
4. Is it possible to be "pragmatic" without an ideological framework? Why does the text argue that "merit" does not simply "leap out" of a case?
5. Why might a "centrist" policy in Sweden be considered "far-left" in the United States? What does this tell us about the "local" spectrum?
6. If two "Great Goods" like justice and mercy clash, does this mean one ideology must be "wrong"? How does this support a pluralist approach?
7. Can you identify a movie or family tradition that reinforces a specific ideological belief as "common sense"?
8. How does the "Anywheres" vs. "Somewheres" debate explain why traditional left-right party alliances are shifting in modern elections?
9. In politics, "ought implies can." If a political goal is deemed "unrealistic," does it cease to be an ideology and become a utopia? Who gets to decide what is "realistic"?
10. Provide an example of a time a political party (Liberal or Conservative) took an action that contradicted their namesake ideology. Why is it a mistake to use party actions as the sole definition of an ideology?

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2: INDIGENOUS WORLDVIEW

Introduction

This chapter explores the Indigenous worldview through a narrative dialogue between an educator and the figure of Coyote, a traditional trickster and mentor. The author examines how displacement and forced migration from ancestral lands impact one's cultural identity and relationship with Indigenous ways of knowing. Central to this perspective is the concept of interconnectedness, where all relations and stories are woven together in a cyclical rather than linear fashion. By treating oral stories as living entities that require care and respect, the text highlights the importance of responsibility and reciprocity in learning. Ultimately, the source illustrates how navigating the space between Eurocentric academia and traditional heritage can lead to spiritual healing and a deeper sense of belonging.

Learning Objectives

- Assess the importance of hiSTORIES in Indigenous worldviews, acknowledging how personal and cultural narratives weave together to create meaning.
- Discuss the concept of interconnectedness ("All My Relations") and how it shapes the responsibilities individuals have to each other, the land, animals, and the spirit world.
- Distinguish between linear and circular (cyclical) learnings, explaining how Indigenous knowledge often lacks a fixed beginning, middle, or end and is instead organized around story as a central pillar.
- Explain the significance of the "Four R's"—Respect, Reciprocity, Responsibility, and Reverence—and how they must be enacted when engaging with, listening to, or sharing Indigenous stories.
- Analyze the impact of (dis)placement, forced migration, and residential schools on the formation of identity and the ongoing connection to traditional ways of knowing.

2.1: What I learned from Coyote

2.2: As I had shared with Coyote

2.3: I hear a hushed voice

2.4: In the first year

2.5: The dream

2.6: I rest my head

2.7: I look around

2.8: Conclusion

2.9: Glossary

2.10: References

2.11: Discussion Questions

Attribution

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2.1: What I learned from Coyote

Coyote

It is dark, and I am sitting on a rock in the forest. The moonlight breaks through the trees and offers just enough light. The smell of the damp forest wraps its arms around me and welcomes me like an old friend. I am waiting for Coyote, and as usual I am not sure if this is a dream or a vision. Coyote has become my friend and writing partner, and our relationship means a lot to me. He is usually here by now, and I begin to wonder if perhaps this was not a visit from Coyote but something else altogether.

I hear a rustling in the trees, and Coyote appears wearing a top hat and looking at an iPhone and chuckling.

“Your Aunty is so funny,” Coyote laughs and taps away at his iPhone in what can only be a response to a text message.

“My Aunty??” My voice is a little shriller than I intend.

“Don’t worry, I don’t tell her your secrets, but we do make fun of… I mean laugh… She reminded me. I was supposed to meet you,” Coyote nods his head in reassurance.

“I want to ask you if you will help me write about my worldview?”

“What would I tell people? I guess I could tell them how wonderful I am and how I am the centre of everything…. Oh… and maybe how my wonderful mentoring centres you and connects story to place and (dis)place and how story is weaved together to create a place that just is, a place that is neither people’s home territories but is their home territories at the same time. I should also tell them that of course I would support you in making sure you do your work in a good way … I mean you still need a lot of help …and that you should put people’s voices at the heart of everything you do. OH OH… I would tell them how I know a story for everything and that stories live forever, and there isn’t anything that isn’t tied to me and my stories. I mean, I am the centre of everything, and everything is the centre of me. Indeed! I think this is an excellent idea I had in helping you write my worldview and making sure you understand the importance of listening. After all, who else would you ask to help you with understanding the world?” Coyote stops to catch his breath and looks excited.

“Coyote, thank you, but my worldview needs to focus on the teachings of who I am and what I know as an Anishnaabe/Nehiyaw woman from Muscowpetung and what guides me and the stories that have been passed down. Your voice is important, and you do know a lot about telling a good story….” My voice trails off as I look over and realize that Coyote is no longer listening to me and is admiring himself in a hand mirror as he wanders off into the forest.

“Thank you, Coyote,” I yell.

“See you soon. You will need me,” he chuckles in response.

As always, my meeting with Coyote leaves me baffled and enlightened. As the way of all good storytellers, he has left me with answers and questions. Coyote is correct, and I go back to what I learned at 9 years old in my Kookum’s kitchen, that story is always at the beginning, middle, end and centre of what we do and not necessarily in that order. Indigenous worldview is complicated, but I know that the best place to start is always with a story.

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2.2: As I had shared with Coyote

Linear Learning is Not Our Indigenous Way

As I had shared with Coyote, I struggled with putting together my own worldview. Writing it in a linear way felt wrong and did not seem to encompass all the knowledge I have been gifted. I worried about the fact that I have been displaced due to forced migration and how this has affected my worldview. This is just one of the intergenerational effects of the residential schools that plague my family. Connection to place is an immense part of Indigenous ways of knowing. How can I represent this without being physically connected to my home? How do I present an Indigenous worldview that is culturally relevant yet my own? I think about my relationship with my mentors, Elders and Coyote as well as the researchers I have learned from, and I know that starting respectfully with a story is important (Archibald, 2008; Tuck and Yang, 2014). I have thought about my own journey to understanding my worldview and recognize that (dis)placement, or perhaps it is replacement, is a good place to start. As my Kookum taught me, the beginning, middle and end are always there, but linear learning is not our Indigenous way.

Displacement

As with any journey, the direct path we plan is not the one we end up taking. My family, much like many Indigenous people from the plains, were displaced from their home territories in the early 1960s (Norris & Clatworthy, 2011). My grandparents' desire to keep their own children from going to a residential school led to them move around Saskatchewan for many years before they came to the realization that the safest thing for them would be to relocate to another province. This relocation was a choice they made, but it actually resulted from the forced migration of Indigenous peoples of the Plains due to a lack of resources and safety and to keep their children from attending a residential school (Norris & Clatworthy, 2011). My aunt tells me that when they arrived in Vancouver, she remembers my Kookum crying every day. "It's ugly here. Everything is so different. I miss our people," were statements they heard her telling Grandfather daily. They all struggled to adjust to living in a city that was so different from their homeland as well as to the loss of culture and connection they were also experiencing. This migration has changed my worldview and changed our own understanding of the world as a family. Our teachings come from oral stories passed down without a physical connection to the land. This is true of many Indigenous people today. I have struggled with this over time, but I eventually have come to understand the power of what I think of as a (dis)placed worldview. It is hard to explain how my own journey through academia has helped me sort my stories or my families' hiSTORIES to create an understanding of my worldview, but through the stress and turmoil of academia this is what happened.

Being Anishinaabe and Nehiyaw

Being Anishinaabe and Nehiyaw in an urban area where I am a guest is not easy. I grew up with a non-Indigenous (adoptive) mom and was only offered glimpses into my culture during summer vacations and visits from my grandfather, who helped raise me. I was starved for stories of my culture, my homelands and ways of knowing that spoke to my soul. It would not be until I was engaged in my master's degree work that I realized there were so many Indigenous people that had experienced and were experiencing the same thing. This need to find a cultural identity and sense of belonging is rampant among Indigenous people, especially with those living in urban areas as a result of migration or displacement (Daschuk, 2019). For many, blending into mainstream society or not identifying with their Indigenous roots becomes a way of coping with these feelings. Research and personal experience have taught me that this is not a solution that works long term (Goodwill & McCormack, 2011). It creates a sense of isolation, fear, identity crisis, and even loathing as one tries to find a place in a world that holds no place for you (Goodwill & McCormack, 2011). Living in this space of disconnection leads to the need for healing and rediscovery, and learning our true stories can be used as a tool of healing in this journey. This journey often begins with examining one's own story, and this can be a difficult journey to navigate alone. Learning to be an Anishinaabe/Nehiyaw woman has been a difficult journey. It competes with a dominant framework and way of knowing that often imposes and makes me forget my traditional ways of knowing. Daniels-Fiss (2008) states that learning to be Nehiyaw (which was once ingrained in her) is difficult and that early education had almost made her question her traditional ways of knowing. I struggle with this knowledge and know that education has damaged and, in some cases, continues to damage the identity and ways of knowing of Indigenous people. Misunderstanding and misusing Indigenous ways of knowing or worldviews also has a history that has inflicted damage on Indigenous peoples, and I have been taught that it must be engaged with in a way that upholds the stories, ways of knowing and Indigenous knowledge that are shared with you (Archibald, 2008; Coombes & Ryder, 2009; Kovach, 2009). My aunt tells me that our worldview is always with us, even when we are (dis)placed and that the need to engage in story is weaved into my DNA.

“My girl, you have listened and told stories since the beginning of time. Long before you were in this dimension, your spirit lived and played in stories. Speak from the heart and listen to the stories of others. What you need is there if you listen with your heart,” she tells me, and I can feel the words come alive within me.

My aunt’s words are important, and they speak to me in a way that reassures me that I will engage in telling this story in a good way. There is a sense of healing that comes from being connected to the stories of those who have walked before me. Wilson (2008) writes that he sees research and writing as ceremony and that while creating a research paradigm he found it difficult to articulate what he knew intuitively. I have struggled with Wilson’s (2008) work in the past, as I struggled to understand the connection of the sacredness of ceremony and the academic world of research and writing, yet I am now able to see that there is a connection. I need to engage in writing with the same care that I would enter a ceremony, and I am not exposing the sacredness of the ceremony but embracing the sacredness of the stories that will be shared with me. I have spent my life trying to be a good listener and will continue to ensure that I listen with an open heart and mind as well as recognize the need for respect, relevance, responsibility and reciprocity when engaging in listening, sharing, telling and learning from story (Archibald, 2008; Botha, 2011; Iseke 2012). The word ‘weave’ has stayed with me from my aunt telling me that story is weaved into my DNA. Weaving is an important part of who we are as Indigenous people, and while my own nation does not weave, I think about our teaching of ‘All my Relations’. This teaches us that we are all interrelated with each other and the land, animals, plants, air and spirit world around us. Our stories weave together, and through them we learn the importance of being connected (Daniels-Fiss, 2008; Kovach, 2012). I know that my own Indigenous worldview has come from the weaving together of stories from two different nations, from the stories of (dis)placement and loss, and from the stories of strength and resilience. Indigenous worldview is the concept of “All My Relations”, as it reminds us of our responsibilities to each other and how our stories may change, but they are always the same.

Indigenous Methodologies

I keep thinking about the concept of stories finding their way home, and I wonder what happens to them when they get lost. Where do they go? Where do they live? Do they visit with the ancestors, or do they hibernate like a bear does in the winter? I have a sudden visual of myself as Mary (as in Mary Had a Little Lamb), and I am trying to guide stories instead of sheep as I try to help them return home, and they are all running in different directions. “Stop,” I yell at the stories. “Line up! We need some order here”. We need order, as how else is there to convey a worldview in a way that is coherent and makes sense? The image of my errant stories comes back to me, and again I picture myself trying to wrangle them like sheep. As hard as I try to file them in a straight line, they insist on running around and circling around each other. Perhaps this is a distinct difference between living with an Indigenous worldview and trying to write about one. For Indigenous people, stories have no beginning, middle or end and cannot be organized in a linear way (Fixico, 2003; Iseke, 2012). How does one do this in a way that shows respect to the knowledge passed on as well as the knowledge that has been gained through life experiences. How will I ensure my work is done in a good way and holds up the stories of those who have walked before me? I want to ask my Elders’ opinions, but I know that this can be problematic for a number of reasons. I ask my aunt how to approach those who I want to talk to about their own Indigenous worldview. “Show up and do the work” my aunt tells me when I question her. This is not a new answer, and I have often wondered what this means, but I am beginning to understand that there will never be a perfect time, place or way to learn, but that if I show up and do my work in a good way the stories will follow.

Indigenous methodologies in education and research honour our voices in our ways of knowing that connect us in mind, body, and spirit to knowledge that has existed since time immemorial (Kovach, 2000). These methodologies include the use of story, as it helps us navigate and understand Indigenous worldview. I know this to be true, and I remind myself that I have known since I was nine years old that story is always the most important thing I can learn from. So why do I continue to come back to this feeling of unsettledness? Perhaps it is because I am still struggling to locate myself within my own worldview. I consider what this means and know that I must continue to question my own ways of understanding and how they have been shaped by my own history, family, displacement, and culture and ultimately how they have been shaped or reshaped by euro-centric education (Peltier, 2018). I am aware that I have not escaped from the years of influence that higher education imposes on us. I move cautiously in all that I do to ensure that I am honouring those that have walked before me and that my work will enhance the journey of those that walk after me. I still wonder how to get to the heart of explaining my own worldview. Like in all moments of internal conflict, I call my aunt and hope that she will help guide me and offer some clarity on my current uncertainty. I call her and share that I am struggling with the concepts of Indigenous worldview.

“Tell it to me, your worldview,” my aunt tells me.

“Well, I know everything is interconnected and that doing things in a good way is important”.

“No, no, my girl. Tell me what speaks to you and what guides you,” she tells me and chuckles.

“Well, to me, respect and responsibility guide me, as it reminds me I have to value everything and everyone I am working with and their way of doing things and their way of understanding. I think of all that I have been taught and realize that there are so many aspects to respect that I must weave into my work. Peltier (2018) reminds me that respect means sharing worldviews and finding space for all ways of knowing to be upheld. It means understanding that everyone is in different places and spaces in our life journeys and with this comes different abilities. Most of all, I think that respect means that I must always reflect on what I bring to the table and adapt it to meet the needs of those I work with in regard to both research and teaching. I also know that I need to respect my own learning journey and ways of knowing,” I tell my aunt. I believe that responsibility and reciprocity cannot be separated from respect. I am always accountable to those I am working with, and as I consider how stories will be shared with me through the scope of my research and teaching I realize that I will be responsible to the stories and to those who share them (Archibald & Parent, 2019; Iseke 2013). I also must reciprocate by sharing myself, my own stories and any knowledge that is shared with me through the work I do (Archibald, 2008; Archibald & Parent, 2019). I believe that to do all of these well, I have to focus on balancing in two worlds and weaving Indigenous ways of knowing with non-Indigenous ways of knowing, as not everyone I work with will embrace the same ways of knowing that I do (Hatcher, Bartlett, Marshall & Marshall, 2012).

“My girl, you have what you need. Just respect in your own process and speak from the heart. Trust in the knowledge your ancestors have shared with you since the beginning of time and what you do not know yet will come to you when the time is right.” My aunt tells me she believes in me and hangs up.

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2.3: I hear a hushed voice

Interstitial Space

I hear a hushed voice behind me and blink my eyes to try to focus. I realize I am in the forest that has become the space and place where I meet with Coyote. This interstitial space has provided me with healing and a sense of understanding and belonging.

“Coyote,” I call out when I do not see him right away.

“SHHHHHHHHHHHHHHHH,” Coyote appears and hushes me. “I just got them to sleep”.

“Just got who to sleep?” I whisper.

“Why, the Stories of course! No thanks to you. They spent all day crying. Shame on you for yelling at them like that. You know Stories are sensitive and should never be linear. Asking them to line up; have you never listened to anything I’ve said?” Coyote stomps off in a huff.

I stand there wondering if I should follow him, but I hear him whispering to the stories.

“Shhh, shhh, it is alright. She won’t hurt you,” Coyote soothes the stories.

I sit down on a rock and sink my feet into the moss. I allow the connection with the earth to ground me, and I feel the stress of the last few days fade away. I reflect on what Coyote has said to me, and for the first time I realize the damage I may have inflicted upon the stories.

Do No Harm

” Non-maleficence,” I say out loud. I contemplate the first principle of ethnography and what it means to do no harm. In ethnography, this refers to the research participants.

“But what about the Stories?” I ask as Coyote appears.

“Exactly,” Coyote sighs and sits down beside me.

I hear a Story whimper from behind me, and my heart squeezes when I think about how I made the Stories feel.

“Maybe you should ask them,” Coyote offers, and he seems to have nodded off.

I take a long look at my friend and realize he has what appears to be Cheerios and applesauce stuck in his fur. I feel grateful for the kindness and support he offered the Stories and realize that there may not always be someone there to undo the harm I cause. The need for relationship and care in those I work with is more important than I realize. I cover Coyote with a small blanket that is sitting beside me. I sit for a while, listening to Coyote’s quiet snores and wonder about what I should ask the Stories.

I stand and walk towards where I heard Coyote comforting the Stories. I come across what appears to be a small nursery and see small bundles lying in cradles. I sit down and rock the cradle nearest me.

“You are so important,” I tell them.

Coyote appears by my side and smiles, “Beautiful aren’t they”?

Stories as My Relations

Margaret Kovach (2000) says that “Oral stories are born of connection within the world, and thus recounted relationally. They tie us with our past and provide a basis for continuity with future generations” (p.94). So… this means that I should treat the Stories

as my relations...

I stop talking, and Coyote looks at me patiently as I struggle to make sense of what he was trying to teach me. I look at the cradles and smile.

“You always make it harder than it is... Did you ever think that you were the reason I needed a nap and not the Stories?” Coyote shakes his head at me.

“They are the centre of everything we do. Like child-centred education, the Stories will take the lead,” I say, and Coyote pats me on the back and nods as he hands me a crying bundle of Story.

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2.4: In the first year

Indigenous Ways of Knowing and Academia

In the first year of my master's degree in Curriculum and Leadership, I met Coyote. Coyote first appeared to me as I unpacked how my Indigenous ways of knowing fit into the world of academia. I often found myself in a place of unsettledness and found that writing in partnership with Coyote helped me balance who I was as an Indigenous learner and educator while fulfilling the expectations of academia and work. Coyote helped me understand that I did not have to choose one way of knowing but that I could learn to dwell in between these different worlds. This relationship with Coyote helped me on many levels, as I found it safe to engage in conversations with Coyote in what had become not just a writing style but a virtual space of gathering. I realized that I was dwelling in what is often referred to as third space (Nakata, 2007). This space where I met Coyote was safe, and I was able to reflect on and speak freely about areas of contention and my growing understanding of what Indigenous ways of knowing and understanding meant to me as an Indigenous student and educator. During this time, I also met Ted Aoki's (1986/2012) Miss O and was instantly drawn to her. Ms. O dwells between curriculum-as-lived and curriculum-as-planned (Aoki, 1986/2012). I resonated with Ms. O for reasons outside of the fact that being flexible in what we have planned to teach makes good sense, but I felt like this is what I was learning to do as an Indigenous educator. I was learning to dwell in the space between my Indigenous ways of knowing and academia in a comfortable way. As I learned to walk in both these worlds, I could begin to make sense out of how to uphold Indigenous ways of knowing and worldviews in a Eurocentric curriculum without losing any of my own beliefs about learning. Of course, it was not quite that simple, and I still find myself questioning how to engage in academia in a way that encompasses Indigenous ways of knowing and embraces my worldview in relevant and meaningful ways. I grapple with a sense of loss, as I know there are stories that will forever be lost to me due to growing up away from my home territory. My aunty offers me the word kiscâyãwin when I explain to her how hard it is to explain longing for something you have never had. She tells me it means to belong somewhere, and this belonging is missing for many. "They are kaskeyihtamowin," she tells me. This means to long for home to a point that it causes physical illness. I think about what this means and how my need for a sense of belonging has caused physical, emotional, spiritual and mental sickness throughout the course of my life. Connection to the land, connection to place, pedagogy of place and space, walking in two worlds and land education are all discussions and theories I know well and yet I still long for a place to call home. Fiss (2008) reminds me as a Nehiyaw woman that I am tied to the traditional land of my people through song, story and blood memory. It is this tie to a land that I have never lived on that continues to call to me and move me forward in my work. I am reminded of a dream I had when I first started graduate school, and now as I revisit the story I can see that the stories that inform my worldview were waiting for me even before I was aware of them (Cajete, 2005; McLeod, 2012).

It was hot, and I could smell the scent of sweet grass on the wind. It was dark, and I could not quite see where I was, but I knew I was at home. The sounds and smells of my home territory were all around me. I could hear the drums in the background and the sounds of a pow wow I was suddenly eager to find. It was as I went to start off towards the sound of the drum that I realized I was not alone. I turned, and there stood an old man; he was small and seemed friendly. "Who are you?" I asked. He didn't seem to speak, but I could hear his chuckling in my head.

"So many times we have been visiting lately, and you don't recognize your old friend. How many lessons, how many fears have I put to rest, and how many laughs have I given to you?"

Suddenly, the man was gone, and in his place was Coyote.

"You hurt Nanabush's feelings, and now he won't play our game," Coyote whined at me.

"Raven, Raven! Where are you?" Coyote's voice echoed around me

"Is this a dream?" I asked Coyote as Raven appeared.

"Is it? Haven't you been asking questions all week? Perhaps we are here to answer them," Raven said as he flew in circles.

It was now that I realized that Coyote and Raven were standing in a grove of cedar trees and that I could smell the earthy, wet smell of a rainforest. I was still standing on what I knew was my home territory, and I still could hear the pow wow drums. But I was not quite home. I seemed to be straddling a space between the land I grew up on as a guest and the land I called home. I looked towards the sound of the drums and felt the sense of peace that always comes over me when drumming starts. I looked

back, and both Raven and Coyote were gone, but Nanabush was back but in a younger form. He was dressed as a young grass dancer. “You are keeping me from the pow wow,” he stated. “What will our relatives do if I am not there for their stories? What kind of a pow wow would that be? Listen carefully, you have a habit of not listening,” Nanubush said and seemed to glow a little. “I have been here always. If I don’t have the answer, ask Raven or Coyote. Boy, do they love to talk! Whether you knew it or not, you learned from us, and now you know if we are not around you are not doing things in a good way.” Nanubush disappeared, and I was standing at the edge of a river with my feet in the water. I heard some rustling behind me, and Coyote darted through the bushes.

“By the way,” he said in panting breaths. “If you don’t know something, ask and listen to the stories. It’s never too late to say, ‘Can you tell me that story again’”.

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2.5: The dream

What a Story May Teach Us

The dream means something different to me as I reread it and contemplate the layered messages that are now apparent. This is what happens when we engage in sharing stories; the current environment we are in shifts, and we are then able to learn in a different space and place, one that connects us with stories that are waiting to be heard. What a story may teach us depends on where we are in our life journey. I believe this is at the heart of Indigenous worldview (at least for me). I strive to create safe spaces to engage in ways that allow others to understand Indigenous ways of knowing in a meaningful way. I think of Coyote and how he has helped me safely unpack my own struggles with understanding Eurocentric concepts and worldviews as well as how he has helped me understand my own worldview. This brings us back to the concept of having to balance in two worlds and how hard it is to dwell in a space and place that one does not understand. I consider the dissonance I felt when I first started visiting Coyote in our interstitial meeting place and understand that learning to dwell in place and space can be difficult and uncomfortable for non-Indigenous learners. I wonder what Coyote's role could be in helping us engage in place and space in a meaningful way. Tuck & Yang (2012) discuss the importance of understanding creation stories that belong to a place but, more importantly, how people become a place. I think about my relationship with Coyote and how he has become the interstitial space where I learn best. Or perhaps we have become the interstitial space where we visit and neither of us exists in that space without the other, and therefore the space would fail to exist if our stories were not intertwined. Coyote's role is important in many Indigenous nations, and without Coyote we would be missing an important historian that shares with us stories about our histories, philosophies and ways of knowing (Archibald, 2008). In fact, Coyote works hard to ensure we understand our connection to the land, place and space around us (Archibald, 2008). Maybe it is not physical space that we need to dwell in to understand the importance of Indigenous worldview but an in-between space where Coyote can help us understand the importance of belonging, connection and the importance of story as a worldview. Maybe Coyote is the key to my worldview, as he allows me to address my sense of (dis)placement in a way that feels like I still belong to home. Connection to land and the stories it holds is a critical component of Indigenous ways of knowing, and through engaging with Coyote in our interstitial place of gathering I have found a way to connect.

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2.6: I rest my head

Respect, Reciprocity, Responsibility and Reverence

I rest my head on my desk and try to centre (or perhaps decentre) myself before I continue writing. I spend some time letting the pressures of the day fall away, a practice I find helps with my ability to focus on the task at hand. I take a deep breath and realize it smells like the forest, and the scent immediately relaxes me. I notice that the sounds of my office around me have dissipated and there has even been a shift in the feeling of the space I am in. I lift my head, open my eyes and nearly jump out of my skin. I am no longer in my office but sitting in the forest in what seems like a small waiting room. I recognize the space immediately as the in-between space where I meet Coyote. I have never met with Coyote during the day and only when I have been at home. I try not to panic and take a deep breath; the scent of the forest works its magic and calms me. I slowly take in my surroundings; I am sitting in a chair in the clearing where I always meet Coyote, but I am not alone. There are chairs and a table set up around me, as if we are in a waiting room of sorts. Magazines sit on the tables, and I glance at the title … 'Coyote Weekly'…'Trickster Times'… 'Journal of a Place That Just Is'… I reach forward to grab one as someone bumps into me, and I realize I am not alone. I look around and take stock of the waiting room. A collection of forest animals sit in chairs looking bored. I shake my head, trying to wake myself up. I must be dreaming, as this seems out of the ordinary, even for a meeting in third space.

"Excuse me," I say to the possum beside me, even as I question the possibility that I have in fact lost my grip with reality. (I should probably examine why even when in this interstitial space I question the possum's existence, but I will save that for later). "Could you tell me what we're doing here?" I ask the Possum.

"Why, waiting of course," the Possum answers.

Just as I am about to ask for whom, Coyote appears as if out of nowhere.

"Hurry, hurry," Coyote shouts at me and gestures for me to follow.

We rush through the forest, and I follow behind Coyote until we come to the side of the river.

"You are so needy," Coyote shakes his head at me. "I have other patients you know!"

"Patients? I'm a patient?… Coyote…" I look over and see Coyote is dressed as a doctor and is writing notes in a chart.

"Look… It's not always that simple. Of course you're a patient, but you're also a…" Coyote doesn't finish his sentence as he madly writes notes.

"A what, Coyote, and why am I here?" I ask, trying not to sound as confused as I feel.

"I can't answer that. You came to see me, and I have a one problem limit per visit sooooo…. Tick tock…" Coyote points at his Apple watch.

"I…I…well…" I stutter as I try to formulate a question.

"Look, I can't help you if you don't know, but I do know this…Sometimes there is more than one worldview. There is always more than one story, and there is never a beginning, middle or end. So, stop struggling with how to start, as it has already started long before you got here," Coyote pats my hand and hands me a lollipop.

"Coyote," I call after him as he hurries away. I want to ask him about the chart, but he disappears, and I realize I am sitting back in my office. I feel unsettled but more relaxed, and I ponder my visit with Coyote. I realize that Coyote is right and that I am part of a story that has started long before I have arrived. Hannah Arendt's ideas of belatedness come to mind, that indeed I have been born into a story that was already started, and with that comes a certain sense of responsibility, but it also means there is important work done by those who have walked before me. It is my responsibility to uphold this work and engage with it in a good way. I think about the women I have met that have and the stories they shared that led me to this space in my educational journey. I have been taught that the four R's are always to be used when engaging with story in any way (Archibald, 2008). Respect, reciprocity, responsibility and reverence should always be enacted (Archibald, 2008).

So, does this sum up Indigenous worldview? I would hope not, as I have been taught that if I do not have more questions than when I started, I had better go back and do it again. I do know that Indigenous worldview is forever changing yet always staying the same. For my own teaching, I know that our Neyihaw creation story reminds us of a time when animals spoke to us and we lived together as a large community. When we as humans started to take advantage and forgot about unity, Creator planned on taking the animals away where they'd be safe, but the animals refused. They understood the importance of interconnection and that without them we would not survive. So, they gave up the ability to communicate with us to continue to nurture us. Just like that, we are back at the very first story, even though we are at the, end and it is this that reiterates the importance of learning in a cyclical and not linear way. We are also back at understanding that the story will always be at the heart of understanding, being and worldview.

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2.7: I look around

Back Where I Started

I look around and realize I am back where I started, as I am sitting on a rock in the forest with the moonlight shining down on me. Beginning, middle or end I am not sure, but what I do know is that I have a better understanding of the importance of visiting Coyote. I have brought a small gift to show my appreciation for Coyote for always embracing the 4 R's with me and being patient while I work my way through challenging concepts and learn new stories. I sense Coyote before I see him and smile, as he always brings me a sense of peace, even though confusion often accompanies the peace.

"It took you long enough," Coyote says and plops down beside me.

"Is this the end or the beginning," I ask as he sits beside me.

"Oh my girl... you still don't get it. It just is. The thing about cyclical understanding is it can be the beginning, middle or end all at the same time, or it could be none of those," Coyote pats my hand. "Whether it is here or there or there or here, we carry our worldview in our hearts and in the stories we have known since well since before forever... It doesn't matter how you get there or where there is; as long as there is story there will be".

"Will be?" I ask. He nods, and we sit in silence, and I know that my journey with Coyote is far from over, just as I know the beginning, middle and end come in no particular order.

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2.8: Conclusion

Concluding Remarks

An Indigenous worldview is cyclical rather than linear, meaning it has no fixed beginning, middle, or end. Key takeaways include:

- Ongoing Journey: The author realizes her journey with Coyote and her exploration of worldview is far from over, as "beginning, middle and end come in no particular order".
- Heart of the Worldview: Worldview is carried within the heart and through the stories known "since before forever," regardless of one's physical location.
- Centrality of Story: Story remains the "beginning, middle, end and centre" of Indigenous ways of knowing.
- Relational Responsibility: Understanding requires upholding the "four R's"—respect, reciprocity, responsibility, and reverence—to honor the work of ancestors and ensure the journey of those who follow is enhanced.

Ultimately, as long as there is story, the worldview continues to live and adapt while staying fundamentally the same.

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- **All My Relations**: A teaching that emphasizes the interrelatedness of all things, including people, the land, animals, plants, air, and the spirit world. It serves as a reminder of the responsibilities individuals have to one another.
- **Anishinaabe/Nehiyaw**: The specific cultural identity of the author, Jennifer Anaquod, who is from Muscowpetung.
- **Circular (Cyclical) Learning**: An Indigenous approach to knowledge where learning does not follow a sequential, linear path. It recognizes that stories and teachings have no fixed beginning, middle, or end, and can be organized in a non-linear way.
- **Connection to Place**: A fundamental aspect of Indigenous ways of knowing that links identity and knowledge to specific land or traditional territories. This connection remains vital even when a person is physically displaced from their home.
- **Coyote**: A figure in many Indigenous nations who serves as a teacher, historian, and storyteller. In the sources, he acts as a writing partner who helps bridge the gap between Indigenous ways of knowing and Eurocentric academia.
- **(Dis)placement**: The experience of being forced from traditional home territories due to migration, residential schools, or other systemic factors, leading to a sense of disconnection from land and culture.
- **hiSTORIES**: The weaving together of personal, family, and cultural narratives to create an understanding of one's worldview.
- **Indigenous Worldview**: A complex, holistic understanding of the world centered on story, interconnectedness, and relationships. It prioritizes cyclical thinking over linear progressions.
- **Interconnectedness**: The concept that everything in the world—people, nature, and the spirit world—is interrelated and tied together through stories.
- **Interstitial Space (Third Space)**: A metaphorical or virtual "in-between" space where different ways of knowing (such as Indigenous worldviews and academic frameworks) can meet and be explored safely.
- **Kaskeyihtamowin**: A Nehiyaw word meaning to long for home to the point that it causes physical illness.
- **Kiscâyãwin**: A Nehiyaw word meaning to belong somewhere.
- **Linear Learning**: A non-Indigenous way of organizing information and learning that follows a direct, sequential path with a distinct beginning, middle, and end.
- **Non-maleficence**: A principle of doing no harm; in the context of Indigenous storywork, it refers to the ethical responsibility to protect and respect both the research participants and the stories themselves.
- **Reciprocity**: One of the "four R's"; the act of giving back and sharing oneself and one's own stories in exchange for the knowledge shared by others.
- **Respect**: One of the "four R's"; it involves valuing all ways of knowing, reflecting on one's own role, and adapting to meet the needs of those one works with.
- **Responsibility**: One of the "four R's"; being accountable to the stories, the people sharing them, and the ancestors who walked before.
- **Reverence**: One of the "four R's"; approaching stories and knowledge with deep respect and an acknowledgment of their sacredness.
- **Story**: The central pillar of Indigenous worldview; stories are living entities that connect people to their past, future, and the world around them. They are viewed as relations that should be treated with care.

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2.11: Discussion Questions

1. The author describes a "(dis)placed worldview" resulting from forced migration and the intergenerational effects of residential schools. How can a connection to traditional home territories and a sense of belonging (*kîscâyâwin*) be maintained through story and "blood memory" even when physical connection is lost?
2. How does viewing knowledge as cyclical (having no fixed beginning, middle, or end) challenge the dominant Western academic framework of linear progression, and what re the implications of placing story at the "beginning, middle, end and centre" of education?
3. Discuss the significance of the "four R's" (Respect, Reciprocity, Responsibility, and Reverence) in Indigenous storywork. Why does the author emphasize the principle of non-maleficence and argue that stories should be treated as "living relations" that must be nurtured and respected?
4. Explore the teaching of "All My Relations". How does this concept of interconnectedness with the land, animals, and spirit world redefine an individual's responsibility to their community and the environment compared to a traditional Western perspective?
5. How does the author's relationship with Coyote help her navigate the tensions between Indigenous ways of knowing and Eurocentric academia, and what does it mean to "dwell in between" these two worlds in a virtual "interstitial space"?

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3: LIBERALISM

Introduction

In the Western world, liberalism holds a privileged place. After all, we often depict today's democracies as *liberal* democracies – meaning that democratic decision making is supposed to conform to liberal principles. As the oldest Western ideology, liberalism has faced many criticisms from all sides of the ideological spectrum, but it has survived in a recognizable form for at least 200 years and has adapted in the face of criticism and major historical and social developments. To better understand the ideology, we will first look at its core values, some of which are common to all of its varieties, and some of which are debated and resonate more with specific variants of liberalism. Then, we will discuss the various types or variants of the ideology, before briefly exploring the challenges confronting liberalism as it faces the future.

This text provides a comprehensive look at liberalism, identifying it as the foundational ideology of the modern era that emerged as feudalism declined. It outlines core values such as individualism, reason, toleration, and justice, while exploring the critical distinction between negative and positive liberty. The source tracks the historical evolution of the movement through three primary stages: the minimal government approach of classical liberalism, the social welfare focus of reform liberalism, and the market-driven resurgence of neoliberalism. It also examines how diverse philosophical frameworks like utilitarianism and social contract theory are used to justify these political principles. Finally, the material considers contemporary challenges to the ideology, including critiques regarding systemic inequality and the environmental impact of global capitalism.

Learning Objectives

- Analyze the historical relationship between Liberalism and modernity, specifically how the ideology emerged during the transition from the fixed social hierarchies of feudalism to the individual-centered dynamics of modern society.
- Identify and explain the core values of the liberal tradition, including the primacy of individual liberty, the belief in human reason, the commitment to foundational equality, and the social principle of toleration.
- Compare and contrast the major variants of the ideology—Classical Liberalism, Reform Liberalism, and Neoliberalism—by examining their differing perspectives on negative and positive freedom, the role of government intervention, and economic management.
- Evaluate the ethical justifications for liberal principles, distinguishing between utilitarian arguments focused on maximizing societal happiness and rights-based (de-ontological) arguments centered on the intrinsic worth of the individual.
- Critically discuss the contemporary challenges and future of Liberalism, including critiques from social justice perspectives regarding systemic biases and questions about the ideology's compatibility with global environmental concerns like climate change.

3.1: Liberalism and Modernity

3.2: The Values of Liberalism

3.3: Liberalism and its Variants

3.4: Classical Liberalism

3.5: Reform Liberalism

3.6: Neoliberalism

3.7: The Future of Liberalism

3.8: Glossary

3.9: References

3.10: Discussion Questions

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3.1: Liberalism and Modernity

Origins of Liberalism

It is important to begin by situating liberalism in historical context. The 'birth' of the ideology unfolded during a period of effervescence on all fronts in Europe – an epoch running from the 16th to the 18th centuries when Europe transitioned from Medieval or feudal society to a condition known as modernity. Speaking very schematically, feudal society was marked by closed economies based on subsistence agriculture, as well as by religious orthodoxy, and complex layers of inherited social rank. Most people living as peasants, or serfs, in a relationship of fealty to the local lord, who in turn owed loyalty to a king. People were seen as members of the social groups to which they belonged: their family, village, local community or social class. Their lives and identities were largely determined by the character of these groups in a process that changed little from one generation to the next. There was relatively little social mobility: 'a man is his rank' as the saying went, and that rank was usually inherited. Those roles came with distinctive and complex sets of expectations, norms, and legal privileges and responsibilities. Thus, people tended not to see themselves primarily as individuals with a unique identity and a destiny to be discovered in the way that today's university students, for example, might be trying to 'find' themselves, working out what they value in life and what their career choices might be. Rather, one's identity was defined by the small community and social role one was born into.

Nor was there much physical mobility. People did travel (e.g., on religious pilgrimages), but tended to live out their lives in the same village or valley of their birth; and such local communities tended to be quite homogenous (see: Bloch, 2014).

Modernity, on the other hand, is the world we know today. It is marked by dynamic, competitive market economies – a system eventually labeled capitalism. Kicked into high gear by the Industrial Revolution that began in the 18th century, the modern condition is marked by ever-changing technology and driven by a combination of the scientific method and competitive market economics; high levels of urbanization; and extremely mobile populations moving over vast distances abetted by transportation technologies such as trains, planes or motorized ships. People also move up and down the social ladder much more swiftly than in societies based on subsistence agriculture, sometimes within a generation, and certainly across generations; a father might be poor, his son middle-class, and his grandson rich. The reverse also holds true.

The modern world is one of large, centralized, bureaucratic states – countries – comprised of national populations living together under shared laws and (usually) shared language. These huge modern states have tended to subsume and destroy many of the local varieties of pre-modern life. For example, according to Eugen Weber, almost half the people in France did not speak French until the latter half of the 1800s; instead, they spoke a polyglot array of dialects and tongues (Weber, 1976). Paradoxically, modern life is also extraordinarily diverse, as massive mobility and urbanization result in people from all sorts of cultural backgrounds, religions and philosophical outlooks living together in the same space. The decline of religious orthodoxies and fixed, inherited systems of rank contributed to heightened individualism: the sense that each individual is unique, with a path in life that is not predetermined at birth but rather explored and chosen by the individual themselves. People were thus confronted by a broader range of choices and social possibilities, encouraged to think for themselves, and to think of themselves in personal terms (e.g., Taylor, 1989; Giddens, 1990).

Hence, as the certainties of feudal life broke down, a new intellectual climate emerged. The Protestant Reformation of the mid-16th century shattered the Roman-Catholic unity of Europe, and the individualism associated with Protestantism – emphasizing salvation through faith alone with the Bible as the ultimate source of authority – encouraged people to value individual conscience more than church orthodoxy. This in turn influenced capitalism, since the individual had a direct relationship with God, which, Protestants argued, made followers more self-directed and disciplined. Over time, material success became viewed as 'a sign of God's favour.'

Meanwhile, scientific explanations gradually came to displace traditional religious theories themselves, as the 18th-century Enlightenment emphasized the power of human reason to shape and improve the world, and society was increasingly understood from the viewpoint of the human individual (Robertson, 2015). Individuals were thought to possess personal and distinctive qualities: each was of special value. Emphasizing the importance of the individual, however, has important consequences. It draws attention to the uniqueness of each human being; individuals are defined primarily by the inner qualities and attributes specific to themselves.

Modernity is often contrasted, not just with Medieval Europe, but with 'traditional' societies around the world, which tend to be agrarian, defined by somewhat static and homogenous local identities, and relatively disengaged from technological dynamism

and science. The classic process of political and economic 'development' (or modernization) generally entails a traditional society moving into a more 'modern' condition akin to that described above. Thus, modernity has spread, with many variations, across much of the globe (e.g., Eisenstadt, 2002).

Liberalism can be understood as the first ideology of modernity. It arose as European society gradually shifted from its feudal to its modern incarnation, and it supplies a way of thinking that justifies many of the tendencies of modernity.

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3.2: The Values of Liberalism

An Evolving Tradition

Like every ideology, liberalism is not a single, static thing but an evolving tradition. Some of the values below will have more importance in a particular time period or within certain countries than others. Nevertheless, there is wide agreement that liberty is at the core of this ideology. Liberalism comes from the Latin word liber, meaning 'free.' Individual liberty is for liberals a supreme political value and, most would argue, the unifying principle of the ideology.

Many early liberals saw individual liberty as a 'natural' or God-given right, an essential requirement for leading a truly human existence (Patterson, 1997) It also gave individuals the opportunity to pursue their own interests by exercising choice.

Liberals tend to see two main threats to the liberty of the individual: other individuals and arbitrary and oppressive governments. Other people can encroach on our liberty by stealing our property, threatening or damaging our person, enslaving us, etc. Individuals therefore do not have an unlimited entitlement to freedom. As John Stuart Mill argues in 1859's On Liberty, although the individual may be sovereign over their body and mind, each person must respect the liberty of others (Mill, 2015).

This is a major reason why liberals believe we must have governments: to protect our liberty against such threats. On the other hand, those same governments can become an even greater threat to liberty! Governments can grow tyrannical, using their massive power to arbitrarily control, detain, punish, terrorize, or even kill us. For this reason, liberals place great importance upon limited government. As the very influential 17th-century British thinker John Locke argued, 'Guards and Fences' need to be placed around governments, ensuring that they do not expand their power too far and thereby corrode our liberty (Locke, 2003). Liberals therefore support the rule of law – the idea that laws must be publicly known and apply to all equally so that no one, including governments, can be exempt from them.

Liberty has been depicted in two principal ways within the liberal tradition (Berlin, 2002). First, there is negative freedom. This is called 'negative' because it is defined by the absence of something, i.e., the absence of interference in the individual's affairs by external actors. While all liberals value negative liberty, it is, as we will see below, of particular importance to classical liberalism and neoliberalism.

There is also 'positive' freedom. Often defined in terms of the capacity for self-mastery or self-realization, we will use it here to denote the idea that for an individual to be truly free, they must have an actual capacity to pursue their ends in life. It is all fine and good to say that you are 'free' to get a university education as long as no one is physically barring your access to campus; but if you lack the funds to pay for expensive tuition, this freedom is meaningless. Positive freedom usually needs some form of external intervention, which is often performed by the state. For example, this will mean making school or education accessible (via free education or student loans) so that all can potentially attend regardless of their level of income. Positive freedom is usually associated with reform liberalism (see the next section).

You may have noticed that, in discussing liberty, we have been consistently speaking about individual liberty. This reflects another key value of liberalism: individualism. This is the idea that human beings are first and foremost individuals and that the individual has supreme moral value. This is a bold change from the more group-centered dynamics of traditional societies, as we saw above.

With this emphasis on individual liberty, it may come as no surprise that liberalism moves its faith away from religion and toward reason. The ideology has deep roots in the Enlightenment project, which aimed to release humankind from its bondage to superstition and ignorance, and to build an age of reason. The idea here is that, to the extent that human beings are rational, thinking creatures, they are capable of defining and pursuing their own best interests. Related to this faith in human reason, many liberals have also been inclined to view human history – or at least, modern history – in terms of progress (e.g., Gray, 2002; Fawcett, 2018). In the liberal view, the expansion of knowledge, through the scientific revolution in particular, enables people not only to understand and explain their world but also to shape it for the better. In short, the power of reason gives human beings the capacity to take charge of their own lives and fashion their own destinies. Reason emancipates humankind from the grip of past superstitions and traditions. Each generation is thus able, at least in theory, to advance beyond the last; a strong emphasis is put on education, discussion, debate and the free exchange of ideas.

So far, we have seen that liberals view people as individuals imbued with reason who should be free to pursue their own ends in life. Two more values are worth noting: justice and toleration.

To go further, Canada, like many Western countries, has adopted some form of liberalism, but injustices were, and are, still being felt. We invite you to read more about Canadians of Japanese descent during WWII, Aboriginal peoples, and the fight for women to get the right to vote. Reflect on why those injustices occurred.

Justice denotes a particular kind of moral judgment, one focused on the distribution of rewards and punishments (or what each person is 'due'). Liberal views of justice are based on a belief in equality of various kinds (see: Pennock and Chapman, 2017). First, individualism implies a commitment to what might be called a 'foundational' equality. Human beings are seen as born equal in the sense that each individual is of equal moral worth. It is from this logic that the concept of natural rights or human rights emerge, along with the idea that each person's happiness should be given equal consideration in moral and political calculations. Secondly, foundational equality implies a belief in formal/legal equality or equal citizenship. This is the idea that individuals should enjoy the same legal status within society, particularly in terms of the distribution of rights and entitlements. Consequently, liberals fiercely disapprove of any social privileges or advantages that are enjoyed by some but denied to others on the basis of what they consider irrational factors such as caste, colour, gender, race, religion or socio-economic background. Everyone should be equal under the law; arbitrary discrimination is unacceptable.

Relatedly, this means that every individual should have the same freedom to rise (or fall!) in society. This does not mean equality of outcome or reward, or of living conditions, since liberals accept that people possess different talents and skills, and some are prepared to work much harder than others. It does mean that social rewards, such as wealth and power, should be available to everyone regardless of arbitrary factors of birth – and they should go to those who earn them through hard work and ability. Society should reward merit, not inherited privilege. This concept is called meritocracy.

Meritocracy (definition)

The word 'meritocracy' has origins in both Latin and Ancient Greek. The word 'merit' has a Latin origin meaning 'to earn', whereas 'cracy' stems from the Greek word 'kratos' meaning 'strength' or 'power'. Therefore, meritocracy is the term given to a system by individuals characterized by their ability, skill and education (or, in short, merit) to hold power positions. Meritocracy ensures that individuals employed in the system are merited for their position and that these employments are not used as political favors. Merit is often decided by an examination, although in the economy it is often thought to be determined by open competition for jobs and market share.

Note that the emphasis on legal equality, meritocracy, and individual freedom all tend to steer liberals toward a belief in equal rights of political participation. Consequently, liberals tend to support democratic forms of political organization in which competition for public office is open to all. However, they insist that democratic decision making should always conform to liberal principles. For example, it is, according to liberals, fundamentally illegitimate for a democratically elected government to persecute a minority group or otherwise compromise basic liberties or liberal justice, even if doing so is extremely popular with a majority of citizens (e.g., Mounk, 2018).

Continuing on the theme of justice: one form of liberalism, known as reform liberalism, argues that in order to achieve a meritocracy, legal equality and the absence of formal discrimination is not enough. We must also have equality of opportunity. That is, we must all have real-life access to a wide range of opportunities and the capacity to meaningfully pursue them. Everyone should have an equal shot at succeeding in life, and the absence of discrimination under law does little to empower us to pursue our aims if, for example, we are trapped in a life of grinding poverty. As we will see, reform liberals conclude that achieving equality of opportunity requires assistance from the state.

The last value we will discuss is toleration. The liberal social ethic, or the will to live together, is ideally characterized by a willingness to accept moral, cultural, and political diversity. The idea of toleration originates in religious wars between Catholics and Protestants following the Reformation and spanning from the 16th to the 18th centuries. John Locke argued that persons of good conscience would never agree on which form of Christianity was correct, and that, therefore, the state should not try to force one model on everyone; rather, it should tolerate such differences (Locke, 2003). As the famous quote (often wrongly attributed to Voltaire, as it appeared in Friends of Voltaire) goes: "I detest what you say but will defend to the death your right to say it".

Toleration is both an ethical ideal and a social principle. As an ethical ideal, it is a corollary of individual liberty, calling upon us to respect that other people are autonomous, in control their own destinies, and entitled to live as they please. As a social principle, it establishes a set of rules about how human beings should behave towards one another when it comes to disagreement and differences of opinion: through rational discussion. Some liberals, such as Harvard philosopher John Rawls, have built on the idea of toleration to argue that the fundamental structures and symbolism of the state should be neutral regarding the 'comprehensive doctrines' – that is, the life philosophies – of the citizens who comprise it (Rawls, 2005).

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3.3: Liberalism and its Variants

Divisions within Liberalism

There are a number of important divisions within the liberal tradition. At the most abstract level, there is a deep disagreement over how to justify liberalism's core principles. It is all well and good to talk about principles such as individual freedom or equality, but imagine you were speaking to someone for whom these are unfamiliar or strange ideas. How would you convince them of the rightness of the liberal vision? Liberals have given many answers to this question over the years. The two most important are utilitarianism and rights-based liberalism.

Utilitarianism, despite the '-ism' suffix, is not a political ideology as such; rather, it is the label we give to a family of ethical theories. These theories hold that, when making important choices, the priority should be creating the most happiness possible. Jeremy Bentham stated in 1780 that 'Nature has placed mankind under the governance of two sovereign masters, pain and pleasure. It is for them alone to point out what we ought to do, as well as to determine what we shall do' (Bentham, 1988). Therefore, in deciding which ideology best serves human beings, we should choose the ideology which, when implemented, will maximize overall societal happiness. For many liberals, that is exactly what liberalism will do. (Note that we do not need to argue that liberalism will make everybody happy; rather, happiness is 'maximized' if a liberal society results in a higher level of overall total happiness in the society under any other system. This model still leaves room for plenty of unhappiness, in theory).

Why can liberalism be thought to maximize overall happiness? At root, the case is straightforward. As an individual, you know better than anyone else what will make you happy. You may not get this right every time – we all make mistakes – but if you are left alone, free to make your own choices in life, the outcomes will be more likely to result in happiness than if parents, priests, or governments manage your life for you, even with the best of intentions. It follows that we should leave people alone to freely run their own lives if we wish to build a society with the happiest possible people in it. This, then, is a utilitarian argument for the core liberal principle of individual liberty. And so utilitarian liberals argue that a liberal society will be the happiest overall society. This is why we should defend liberal principles.

A whole other approach centres on the intrinsic value of liberal principles, irrespective of their real-world consequences. (Such approaches are often called 'de-ontological'). When the great German philosopher Immanuel Kant quotes the Latin phrase *Fiat justitia, pereat mundus* – 'let justice be done, though the world perish' – he captures the idea that justice has such high value for its own sake that we cannot allow any 'real-world' considerations to distract from our commitment to it (Kant, 2006). The effects of our choices, including the happiness or unhappiness produced, are less important than the principles that inform those choices. For liberals in this tradition, human beings just do have rights – rights to freedom, due process, security of the person, and so forth. To violate individuals' rights is, on this view, wrong in and of itself. There is an inherent worth to the human individual that cannot be compromised for greater gains in happiness, prosperity, or other considerations. Rights-based liberals argue that liberalism is the best ideology because it protects these rights better than any other alternative.

John Locke, for example, famously argued that humans once lived in a 'state of nature:' a world without government. In this world, people had 'natural rights' to do as they pleased. While he thought that, on the whole, people would respect what he called the 'laws of nature' – basic moral principles about how to treat other people – he acknowledged that there was no way, absent government, to ensure they would. Some people would be predatory, stealing our property or otherwise threatening our lives and liberty. Sometimes people would honestly disagree over how to treat each other. There is no way to arbitrate such disputes without government. So, Locke concluded, in order to better protect our natural rights, human beings agree to establish governments and to abide by their laws. This principle, whereby we agree to limit our natural freedoms under laws enforced by governments, Locke called 'the social contract.' The key, of course, is that the entire point of creating governments is to better protect our rights, which Locke saw as God-given. A government that consistently fails to protect our rights, or, worse, makes itself a threat to them, breaks the terms of the contract. We are no longer obligated to obey such a government. Indeed, Locke said, we can justly overthrow it (Locke, 2003).

Locke published his works long before the distinction between utilitarianism and rights-based (or 'de-ontological') liberalism had emerged. His own writing freely mixes the two levels of argument. But thought experiments like his 'social contract' have been influential among later generations of rights-focused thinkers. John Rawls, the most important liberal thinker of the postwar era, argued that if we want to know what a just society would look like, we should imagine ourselves deliberating with others about the basic rules of our society behind a 'veil of ignorance' concerning our actual situation in life. Not knowing whether we were

rich or poor, for instance, would allow us to settle upon genuinely fair principles of economic organization unaffected by our vested interests. And, as a good rights-based liberal, one of the key principles he thought we would agree on is that individual freedom and equality of persons should be afforded strong protection by the society. Indeed, they should have 'lexical priority' over considerations of happiness. In other words, they should come first, having primacy over other values. Knowing that, once the veil of ignorance was lifted, we might end up as members of a vulnerable minority, for example, would motivate us to build very strong protections for freedom and equality into our society (Rawls, 1999).

As noted above, this is a fairly abstract distinction. Not all arguments between liberals have been so rarified. The most important division within the liberal tradition – the break that has mattered the most to ordinary people's lives, as opposed to debates between political theorists – is between classical and reform liberalism.

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3.4: Classical Liberalism

Introduction to Classical Liberalism

Classical liberalism represents the ideology in its original form: a set of beliefs that coalesced in Britain and from there penetrated into America and Europe, over the 17th and 18th centuries. By the middle of the 19th century, this classical version of liberalism had attained peak influence, becoming something like the 'common sense' of a great many statesmen. As opposed to a model of society defined primarily by aristocratic privilege, religious orthodoxy, and closed economies, classic liberals emphasized individual liberty and what we would today call 'personal responsibility.' For example, a person could do as they pleased as long as they injured no one; the appropriate role for government intervention in social life was modest, involving such activities as maintaining a military, and building roads and bridges and other basic infrastructure. This approach gave people considerable freedom to live as they wished. That said, people who made what were understood to be irresponsible or immoral choices were left to fend for themselves, relying on private charity; those who could not pay debts were thrown in prison, and little consideration was given to life circumstances. If someone turned to crime, the fact that they might have been born into abject urban poverty and had few other options was simply irrelevant.

Formal/legal equality was an important classical liberal principle; however, it was usually defined very narrowly by today's standards. Early classical liberals tended to believe that there should be legal equality for propertied men. This represented a huge advance for equality compared to the complicated networks of inherited legal ranks and privileges that tended to mark pre-liberal Europe. Its limitations, however, are obvious. The idea was that, if one did not possess property, one had no stake in social prosperity – and, as Bob Dylan sings, 'when you ain't got nothing, you got nothing to lose.' Such people could not be trusted to make responsible choices with the public purse. Therefore, a wide diffusion of full rights of citizenship, including the right to run for office, was out of the question as far as many early classical liberals were concerned. There was also a belief that reason, and other basic attributes of fully realized humanity, required a degree of cultivation that was beyond the reach of poor and working-class people, who were consumed with a desperate daily grind and in no position to realize such gifts. Thus, only well-to-do men had full rights of citizenship. Women, meanwhile, were also regarded as less than fully rational and were generally considered property of their husbands. Unattached women could find employment in some domains, such as teaching and service, but they lacked the full array of legal rights and entitlements that classical liberal 'equality' demanded for propertied men. The fact that women in Canada were not legally declared 'persons' until 1929 exemplifies the blatantly patriarchal assumptions that tended to inform classical liberal thought in the 18th and 19th centuries.

Still, we should not be too dismissive of the radical seed contained in the classical liberal commitment to equality. As noted, it was a bold idea when compared to what went before. Classical liberal nostrums about 'the rights of man' and 'all men [being] created equal' could eventually be leveraged to demand full legal rights for all males, irrespective of property or wealth, which is what happened over the course of the 19th century in many countries influenced by liberalism, such as Britain, Canada, and the United States. Legal discrimination on the basis of religion and race gradually became more distasteful to classical liberals over time. Furthermore, the English words 'man' and 'men' often meant 'humanity as a whole,' including women. Suffragettes could call upon the same ideals to demand equal legal rights for women – a struggle that won many key victories in the early 20th century.

Economically, classical liberal doctrine was heavily influenced by the great economist and moral philosopher Adam Smith. Smith argued, in effect, that the free market is an optimally efficient system. The profit motive gives businesses a strong incentive to produce things that people want to buy, while competition gives them strong incentives to do so as cheaply and efficiently as possible. The market acts like an 'invisible hand:' overproduction is swiftly corrected because flooding the market destroys profits, so people stop producing such items and services; under-production is swiftly corrected because of the rewards that come from meeting untapped demand. The best thing for governments to do is to get out of the way: laissez-faire, i.e., leave the market alone, was the watchword. Doing so will lead to economic expansion, or 'the wealth of nations.' The role for government, Smith thought, was to provide national security, law enforcement, and infrastructure, which could not profitably be provided by market actors. (Smith also argued for the public provision of schooling at all levels and showed openness to government regulation in some cases, but later generations of his followers often ignored these arguments) (Smith 1970).

Historically, classical liberalism grew in influence as capitalism and the effects of the Industrial Revolution spread throughout much of Europe and North America and, eventually, beyond. These forces came together to provide colossal technological innovation, urbanization, and the creation of huge amounts of private wealth. The classical liberal model seemed, in many eyes, to work. Those countries in which it was influential seemed incredibly dynamic and often very prosperous, taken as a whole.

However, the second half of the 19th century brought increasing doubts about all of this. Laissez-faire capitalism and industrialization created immense wealth and technological innovation, but also appalling poverty. Labourers often worked in miserable conditions for long hours and for minimal pay. They were frequently children. Urban slums abounded and were rife with prostitution, disease, and violence. Economic slumps brought little assistance from the state and could leave even hard-working and capable people in desperate straits. As workers gradually acquired voting rights and as labour unions increasingly mobilized – and socialism and anarchism gathered force as possible alternatives – liberals began to rethink what their ideology meant. Gradually, this ushered in a new version of liberalism often called 'reform' liberalism.

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3.5: Reform Liberalism

Introduction to Reform Liberalism

Reform liberalism modifies the meaning of liberalism's key ideas of liberty and equality. Classical liberals focus on negative liberty – freedom as the absence of interference with the individual. Reform liberals certainly agree that the freedom to be left alone ('negative liberty') is important, but they add a more positive requirement: for an individual to be truly free, they must have an actual capacity to pursue their ends in life.

Similarly, where classical liberals see equality in terms of equal legal rights, reform liberals argue that, yes, equal rights are important, but we also have to have equal opportunities. Taking the same example, the 'right' to get a university education is worthless unless one has a meaningful opportunity to act on this right – e.g., through government subsidies to post-secondary education, paid for by taxation, which make it financially affordable to attend.

As this example suggests, the standard reform liberal answer to the question of how to create 'positive' liberty and 'equality of opportunity' involves a much more active role for government than imagined by classical liberals. This typically involves redistributing wealth: taxing those with higher incomes and directing that money into government-sponsored programs accessible to all (such as old-age pensions, unemployment insurance, subsidized higher education, publicly funded health insurance, and so forth). The assemblage of social programs intended to protect citizens from destitution 'from cradle to grave' came to be known as 'the welfare state' and by the mid-20th century had become a more-or-less consensus position in liberal democracies (Renwick, 2017). The role of the state expanded massively between 1900 and 1970, as governments influenced by reform liberal ideas became providers of a huge array of programs.

U.S. President Franklin Delano Roosevelt captured the spirit of reform liberalism toward the end of his 1944 State of the Union Address when he declared that 'true individual freedom cannot exist without economic security and independence. Necessitous men are not free men.' He went on to propose a new Bill of Rights that included the right to a good job, food, clothing, recreation, housing, medical care, good education, and economic security in old age. These aspirations capture very well the reform liberal view of the role of government.

Reform liberalism also took a different view of economics. Here, the key figure was the great economist John Maynard Keynes. Keynes argued against the laissez-faire preferences of classical liberals. Recessions and depressions caused enormous unnecessary suffering, and the Great Depression of the 1930s showed that the 'invisible hand' could not be trusted to end that suffering in a timely manner. The solution, again, was a much more active government. Governments could stimulate 'aggregate demand' for products and services through make-work projects, infrastructure development, and subsidies to individuals and companies (later Keynesians added tax cuts and lower interest rates to this formula). Stimulating demand would lift the economy out of recession and get things back on track. To pay for economic stimulus, Keynes thought governments should practice deficit spending if necessary during downturns. Once the economy picked up again, they should pay down the deficit. Such 'Keynesian economics' promised to smooth out the 'business cycle' of economic growth and contraction that had long bedeviled capitalist economies (Skidelsky, 1986).

This combination – welfare states plus Keynesian economics – defines reform liberalism, and it became the dominant liberal model during the postwar era (1945 to about 1980). Most liberal-democratic governments practiced some form of it. States came to oversee a suite of social programs, regulations, powerful labour unions, and what was often called 'macro-economic management.' This entailed a larger degree of economic planning and public ownership that had prevailed before the Second World War. Full employment was often the stated goal. The state, far from leaving people to fend for themselves in a dynamic but often merciless market, now had a direct responsibility for the economic welfare of its people.

By the 1970s, this semi-consensus had begun to break down. The western postwar boom seemed to have ground to a halt: a combination of high inflation and high unemployment ('stagflation') baffled economists and challenged governments, which found themselves running structural, that is, ongoing, deficits, and ratcheting up debt.

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3.6: Neoliberalism

Introduction to Neoliberalism

Classical liberalism had never really vanished; its thinkers and economists toiled on the margins during the reform liberal heyday. But with the crisis of reform liberalism, they once more stepped into the spotlight. Thinkers such as Friedrich Hayek and Milton Friedman argued that the reform liberal state that had developed over the 20th century was bloated, inefficient, and oppressive. The more governments did, the greater the proportion of our lives that fell under the influence of a single, coordinated source of human control. Whereas in a laissez-faire economy, outcomes are determined as a result of a multitude of free and uncoordinated individual choices by producers and consumers, in an economy marked by heavy redistribution and macro-economic management, outcomes that shape our lives are determined by a small number of deciders in government, backed by the coercive power of law. This, Hayek thought, was tyranny, the 'road to serfdom' (Hayek, 2014). Meanwhile, Friedman argued that high inflation, caused in part by minimum wage laws and labour union demands driving up wages, distorted price signals and discouraged entrepreneurial dynamism, thereby crushing economic growth (Milton, 2017).

Both agreed on the answer: much smaller and less active government, much lower taxation, minimal regulation, and a general emphasis on private ownership and market mechanisms. By rolling back government, minimizing redistribution and social programs, and leaving the market alone, we would have a dynamic and innovative economy that spurs higher levels of prosperity and is freer to boot.

Leaders such as U.S President Ronald Reagan (in office from 1980–88) and U.K. Prime Minister Margaret Thatcher (in office from 1979–1990) embraced this approach, a configuration that became known as 'neoliberalism.' The agenda called for tax cuts, including to the wealthy and corporations; the privatization of publicly-owned assets and companies; and international and global trading agreements designed to lock in the free movement of capital and, to a lesser extent, labour across national borders (a formula known as 'free trade' and, later, 'globalization'). A tight money supply completed the picture. If the consequence was lower levels of protection for citizens and workers – weakened social programs, diminished unions, reduced job security, possibly stagnating wages, and rising inequality – this would be made up for by greater innovation and economic dynamism, cheaper consumer costs due to increased competition and lower interest rates and taxes, and balanced government budgets.

By the year 2000, even nominally left-tilting governments, such as Tony Blair's Labour Party in Britain or Jean Chrétien's Liberal Party in Canada, had embraced much of this recipe. These years were generally marked by sustained (if unspectacular) economic growth. They were also years of enormous technological change, with digitization and the rise of the internet.

Yet neoliberalism perhaps contained the seeds of its own demise. Globalization brought increased levels of inequality in the prosperous countries that embraced it most fervently. Many felt that globalization hollowed out much of the western working classes, as jobs migrated to low-wage countries such as China. The deregulation of the financial sector, in line with the neoliberal preference for less intrusive government, contributed directly to a global economic meltdown in 2008 triggered by irresponsible mortgage lending: the 'Great Recession.' Faced with this cascading economic catastrophe, governments frantically rediscovered Keynesianism, launching huge stimulus programs. Meanwhile, under the influence of protests such as the Occupy Movement and progressive economists such as Thomas Piketty, economic inequality returned to the mainstream public agenda after years of being little discussed (see Piketty, 2014). Western governments once again fell into structural deficits, as citizens demanded more active spending without quite being willing to surrender the neoliberal emphasis on low taxation. Trade agreements such as 1994's North American Free Trade Agreement as well as the much deeper economic and political integration entailed by the European Union (EU) came under attack by populist-nationalist governments, such as the administration of U.S. President Donald Trump (2016–2020) and the 'Brexit'-supporting U.K. Conservative Party, which pulled Britain out of the EU. Globalization seemed on the retreat, and government spending was back 'in.' Keynesian stimulus dominated the 2010s, and then came the dramatic government response to the even more dramatic crisis caused by the COVID-19 pandemic.

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3.7: The Future of Liberalism

Liberalism's Increasing Challenges

The neoliberal project (peaking from 1980–2010) seems to have fallen into disarray. It has been succeeded by a somewhat nostalgic turn back toward reform liberalism and nationalist economic protection, but also by massive government deficits and ongoing low rates of economic growth in western nations. Meanwhile, liberalism as an ideology faces increasing challenge from other quarters.

Anti-racist, decolonizing, and feminist intellectuals critique liberalism's emphasis upon individual liberty, and even reform liberalism's ideals of equality of opportunity, as insufficient. By taking people as they are and encouraging mere 'toleration' rather than a deep understanding of, and deference toward, marginalized perspectives, liberalism (they argue) allows profound and invisible biases to fester. For example, hiring committees might unconsciously favour Caucasian, settler males; voters and political parties might harbour received understandings of 'leadership' as inherently male (or white). Standard practices in business and government, and all sorts of spheres of private life, presented to us as 'fair' and 'neutral' might in fact reflect norms created by (and for) straight, white, able-bodied, male settlers. For that matter, liberal societies in countries like Canada are built on the seizure of indigenous lands and the genocide of indigenous inhabitants. Liberalism, these critics assert, has failed to meet the challenges of systemic racism, micro-aggressions, and the fundamental problem of liberal-democratic states and economies having been constructed upon indigenous territories and the forced labour of black bodies. Proponents of 'social justice' frequently articulate a need to go beyond liberalism toward a transformation of the prevalent practices, beliefs and assumptions at work in liberal societies. Many liberals worry that this emphasis on social justice pays too little heed to due process, formal equality, and the possibility of sincere and thoughtful disagreement (Campbell and Manning, 2018).

Meanwhile, the existential threat of global warming casts a pall over contemporary capitalism, raising questions about whether the endless quest for economic growth associated with market economics is even compatible with the flourishing of human life on the planet. It remains to be seen whether liberalism, which has been so influential for the past 200 years, can retain its favoured status in light of such challenges.

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- **Capitalism**: A modern economic system characterized by dynamic, competitive market economies, ever-changing technology, and high levels of urbanization.
- **Classical Liberalism**: The original form of the ideology that emphasizes negative liberty, personal responsibility, and a modest role for government, primarily limited to infrastructure and national security.
- **Deontological Liberalism (Rights-based)**: An approach that views liberal principles and individual rights as having intrinsic value independent of their real-world consequences or effects on societal happiness.
- **Equality of Opportunity**: The reform liberal principle that individuals must have real-life access to opportunities and the actual capacity to pursue them, often requiring state intervention to overcome obstacles like poverty.
- **Foundational Equality**: The belief that all human beings are born with equal moral worth, implying that everyone should enjoy the same legal status and have their happiness considered equally in political calculations.
- **Individualism**: The core liberal value asserting that human beings are first and foremost individuals and that the individual possesses supreme moral value.
- **Keynesian Economics**: An economic theory advocating for active government intervention to manage "aggregate demand" through infrastructure projects, subsidies, and **deficit spending** to smooth out the business cycle.
- **Laissez-faire**: An economic doctrine, meaning "leave it alone," which argues that the free market is an optimally efficient system that governments should not interfere with.
- **Liberal Democracy**: A political system where democratic decision-making is required to conform to liberal principles, such as the protection of individual rights and the rule of law.
- **Liberalism**: The first ideology of modernity, centered on individual liberty, human reason, and the belief that the expansion of knowledge enables people to shape their own destinies.
- **Limited Government**: The principle that "guards and fences" must be placed around government power to prevent it from becoming tyrannical and corroding individual liberty.
- **Meritocracy**: A system where social rewards, such as wealth and power, are distributed based on individual ability, skill, and hard work rather than inherited privilege.
- **Modernity**: The contemporary condition defined by capitalist economies, centralized bureaucratic states, high social and physical mobility, and heightened individualism.
- **Negative Freedom (Negative Liberty)**: A concept of liberty defined by the absence of interference in an individual's affairs by external actors like the state.
- **Neoliberalism**: A variant of liberalism that advocates for rolling back the state through tax cuts, deregulation, privatization, and global free trade to spur economic dynamism.
- **Positive Freedom (Positive Liberty)**: The idea that for an individual to be truly free, they must possess the actual capacity (such as health and education) to achieve their goals, often necessitating state support.
- **Reform Liberalism**: A variant that modifies liberal thought to include positive liberty and equality of opportunity, supporting a welfare state and Keynesian economic management.
- **Rule of Law**: The principle that laws must be publicly known and apply to everyone equally, ensuring that no one, including the government, is above the law.
- **Social Contract**: A theoretical agreement where individuals agree to limit their natural freedoms under laws enforced by a government specifically created to better protect their rights.
- **Toleration**: A social principle and ethical ideal characterized by a willingness to accept moral, cultural, and political diversity through rational discussion.
- **Utilitarianism**: An ethical framework that justifies liberal principles by arguing they maximize the overall total happiness of a society.
- **Veil of Ignorance**: A thought experiment used to determine the rules of a just society by imagining oneself deliberating without knowing one's own actual circumstances, such as wealth or status.
- **Welfare State**: A system of social programs, such as old-age pensions and publicly funded health insurance, designed to protect citizens from destitution "from cradle to grave".

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3.10: Discussion Questions

1. How do liberals define individual liberty, and why are "guards and fences"—such as limited government and the rule of law—essential to preventing both other individuals and the state from becoming threats to that freedom?
2. Compare and contrast the utilitarian justification for liberalism (focusing on the maximization of societal happiness) with the rights-based (de-ontological) approach (focusing on the intrinsic value of individual rights). Which framework provides a more robust defense of personal freedom in a modern society?
3. How do the definitions of freedom and equality shift when moving from Classical Liberalism (emphasizing negative liberty and formal legal equality) to Reform Liberalism (emphasizing positive liberty and equality of opportunity)? In your view, is the state's role as a provider of a welfare state a necessary expansion of liberty or an encroachment upon it?
4. If you were behind John Rawls's "veil of ignorance," deciding on the basic rules of a just society without knowing your own wealth, status, or identity, what principles would you settle on? Would this thought experiment lead you to favor a system that prioritizes individual market success or one that ensures a baseline of economic security for all?
5. Critically discuss whether liberalism can adapt to contemporary challenges such as systemic racism, colonial biases, and the existential threat of global warming. Does the liberal focus on individualism and market-driven growth allow it to address these issues effectively, or do they require a move toward a different ideological framework?

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4: CONSERVATISM

Introduction

It is a general feature of human experience that a large segment of the population will have an attachment to past or current ways of doing things. As a political attitude, this attachment forms the basis of what is nowadays called conservatism. The conservative political attitude is therefore a near universal phenomenon. Along with the universality of conservatism, however, we must remember another important fact: there is such disagreement among conservatives that identifying a set of ideals or values that is common to all conservatives is difficult. For example, the conservatism of populists like Donald Trump is very different compared with the former Prime Minister Stephen Harper, and neither of these conservatives have much in common with Benjamin Disraeli or John A. MacDonald, two proponents of what has been called Tory democracy.

It is in the nature of conservatism that it will differ from place to place. At the simplest level, it aims to conserve; the specific traditions a conservative movement will seek to conserve depend on the political traditions in question. That is why, for example, American conservatism is often different than Canadian conservatism: conservatives in each country are attempting to conserve different traditions and institutions.

Most conservative outlooks fall into one of two broad categories: classical conservatism and modern conservatism (sometimes called the New Right). This chapter will examine both variants, but first looking at classical conservatism, then modern conservatism. A final section will look at the future of the ideology.

This chapter explores the multifaceted nature of conservatism, highlighting its evolution from a historical disposition into various modern political branches. Classical conservatism is defined by a reverence for tradition, a belief in organic social hierarchies, and a skeptical view of human perfectibility through radical change. In contrast, modern conservatism emerged from the "Reagan-Thatcher revolution," shifting the focus toward free markets, deregulation, and a smaller state. The text further distinguishes specific subgroups like libertarians, who prioritize individual liberty, and neoconservatives, who advocate for strong national authority and the global spread of democracy. Finally, the source addresses the contemporary rise of populism and how these conflicting internal ideologies create ongoing tensions within conservative political parties.

Learning Objectives

- Distinguish between classical conservatism and modern conservatism: Understand the fundamental differences between traditional "High Tory" values and the market-oriented "New Right" that emerged during the Reagan-Thatcher era.
- Discuss and analyze the main unifying values of conservatism: Examine core principles such as the importance of tradition, the necessity of hierarchy and authority, the organic theory of society, and the recognition of human imperfection.
- Name key thinkers of conservatism: Identify the contributions of influential figures like Edmund Burke (tradition), Michael Oakeshott (critique of rationalism), and Irving Kristol (neoconservatism).
- Assess the role of conservatism in today's politics: Evaluate current trends and internal tensions, including the rise of populism and the differing perspectives of libertarians and neoconservatives on the state's role in society.

4.1: Classical Conservatism

4.2: Modern Conservatism

4.3: Libertarianism

4.4: Neoconservatism

4.5: Conservatism in the Future

4.6: Glossary

4.7: References

4.8: Discussion Questions

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4.1: Classical Conservatism

Introduction to Classical Conservatism

Classical conservatism is characterized by a complex of themes and values, none of which are completely independent of each other. The following section will discuss the most important of these in order.

Tradition

Perhaps the most important marker of conservatism is the importance of traditional practices and modes of thought. Tradition plays two distinct roles in conservatism. First, it refers to ideas and practices that have stood the test of time. Edmund Burke (1729–1797) wrote of the partnership between the living and the dead, and conservative writers in many eras have echoed this sentiment. It may be helpful to think of tradition itself as the accumulation of practices and ideas that have been proven to work for generations. This does not mean that every old idea is good or that all new ideas must be viewed with suspicion. However, the fact that an idea or practice has persisted is said to count as a point in its favour.

In fact, we can take this idea one step further. It may not even be a question of whether one should accept or reject tradition; instead, a conservative would argue that we cannot help but be shaped by the traditions our society has inherited. Proposals for political reform only make sense or are feasible in a given society if they are products of its own traditions. This does not mean that no new ideas are possible. As conservative philosopher Michael Oakeshott (1901–1990) suggests, traditions are "neither fixed nor finished," but are more like conversations (Oakeshott, 1991, p. 61). New ideas can always be introduced into a conversation, but it is better if they arise naturally and organically out of what has been said before instead of being an abrupt change of topic. Following Oakeshott's conversational model of tradition, new ideas for political reform are acceptable if they are based on longstanding practices and norms.

The second way in which tradition is important to conservatives is that political institutions take time to build. Though they are not perfect, and in some cases may serve unjust purposes, conservatives warn that once torn down, political systems can only be rebuilt with great difficulty. Radical change in the hope of a more just alternative is risky, since there is no guarantee that the new system will be more just or stable than the old. As American conservative Russell Kirk (1918–1994) writes, "[conservatives] prefer the devil they know to the devil they don't know" (Kirk, 2007, p. 7). This was a central concern in one of the classic works of conservative theory in the modern era: Edmund Burke's Reflections on the Revolution in France (1790). One of its recurring arguments was that, in toppling the existing political system, the French Revolution destroyed the basis of order and stability. Burke wrote:

Rage and frenzy will pull down more in half an hour than prudence, deliberation, and foresight can build up in a hundred years. The errors and defects of old establishments are visible and palpable. It calls for little ability to point them out.... At once to preserve and reform is quite another thing (Burke, 2003, pp. 142–143).

Tradition, in sum, is a set of limitations on what can or should be done in the political sphere. It is important to classical conservatives because justice and social order will be best achieved if we begin from what we currently have, even if it falls short of perfection.

Hierarchy and Authority

Classical conservatives place a premium on preserving social order and stability, and respecting tradition is a means to that end. Hierarchy and authority are important for the same reason. Each of these terms must be precisely defined in order to avoid confusion. Hierarchy does not mean that all social differences are natural or just, but only that a social order requires at least some stratification. At the most basic level, there must be some members of society with more social or political power than others. This does not necessarily mean that those with more power are intrinsically more important or intelligent than the rest, though some conservatives have, unfortunately, believed this. There is, however, and must be, a measure of inequality between certain groups: politicians and citizens, employers and employees, and parents and children.

Authority requires the recognition of legitimacy and is therefore different than mere power. It goes hand in hand with hierarchy because the social bond between members of a political society must be held together by a sense of legitimacy if the political

community is to survive. This creates two sets of obligations. Citizens, employees, and children should respect the legitimate authority of their superiors; their superiors, however, also have an obligation to behave in such a way that they honour and preserve the legitimacy of their authority. For example, legitimate authority can easily degenerate into illegitimate power when, for example, employers exploit their employees; classical conservatism is strongly opposed to such exploitation and abuse of authority.

Social bonds, and hence political order and stability, flourish in an environment of legitimate authority rather than mere power. This is one reason for the importance to conservatives of the family unit; for many of us, families are the first experience of legitimate hierarchical authority. Families are the basis of communities, so family allegiance helps create the broader bonds of allegiance and legitimacy that a healthy social order requires.

At this point, we can see that conservatism – at least as defined by some of its major theorists – is not necessarily a justification of an unjust status quo for the benefit of the rich and powerful, as some liberal or radical critics might argue. This disagreement between conservatism and its critics is not about whether human rights should be protected or not, but about the best way to protect those rights. Without denying the importance of human rights, Edmund Burke argued that abstract natural rights alone cannot be the basis of political order. Counter-intuitively, the best guarantee of political freedom is to preserve the natural aristocracy, by which he meant the system of hierarchy and authority that is held together by feelings of legitimacy and allegiance.

Organic Theory of Society and the State

Politicians and political theorists often use terms like “body politic” or “social body.” Classical conservatives take this idea very seriously and think of the state as being like a living organism. A political society can be healthy or sick, just like a living organism, and the preservation of social health is of the utmost importance to conservatives. That is why it is so important that relationships – even when unequal – remain legitimate. People must feel a natural allegiance to their community; a political system upheld by power or coercion alone is unhealthy and cannot be expected to survive, let alone flourish.

This is another way of thinking about the need for the unequal distribution of rank and authority. Just like a physical body, the body politic requires many parts, each of which must perform its assigned function if the organism is to flourish. This was argued in great detail by the Greek philosopher Plato, who in the Republic compared the city to the human soul. The individual soul is made up of a thinking part, a desiring part, and a passionate or courageous part; in the just individual, the thinking part controls the desiring part with the help of the courageous part. Plato argued that the city can be thought of in the same way, being comprised of three classes – guardians, auxiliaries, and producers – corresponding to the parts of the soul. A just city, like a just individual, is one in which each class performs its proper function.

The organic conception of society also means that change must be gradual and incremental, not drastic and sudden. A radical change, or the introduction of completely new governing principles, is unlikely to be perceived as legitimate by the majority of citizens, which can have a detrimental effect on social cohesion and political stability. Political reform, while possible – and often desirable – must arise out of principles already at work in the society and its inherited traditions. Biological organisms do change, but they change slowly and in keeping with their inner principles – that is, their genetic structure. For the classical conservative, growth in this manner is the ideal model of social and political change.

Human Imperfection and Fallibility

It should be clear by now that classical conservatism is less idealistic than many other political perspectives, and indeed it can be accused of being downright pessimistic. The main reason for this is its opposition to political rationalism, namely the idea that political systems should be patterned after rational and all-encompassing systems of thought. According to classical conservatism, human beings are motivated by feelings, friendships, and allegiances as well as by reason. Therefore, reducing politics and law to a set of rational principles runs the risk of failing to secure the allegiance of citizens. Put simply, political allegiance and social bonds must, for these conservatives, appeal to the heart as well as the head. In practice, this means that the best possible set of laws and political institutions, even if they were perfectly designed in accordance with the best possible rational plan, would not work in the real world with people as they are. Contrary to idealist conceptions of justice and political order, human beings act on the basis of communal loyalty, custom, and selfish interests in addition to abstract principles of right. A set of laws that has any hope of maintaining peace and order must take the entire range of human motivations into account.

Political Rationalism

With the rise of modern philosophy in the 16th and 17th centuries there was a growing desire to explain more elements of human life in terms of reason alone without having to rely on other sources such as tradition, authority, or faith. This approach

was adopted by political theorists who proposed theories of morality and political justice that were based on universally valid principles of reason. Rational principles of justice are, in theory, understandable and acceptable to anyone willing and able to exercise their private faculty of reason. This political approach assumes that there is one set of universally valid principles of justice, and that any state that fails to put these into practice is acting unjustly and, more importantly, violating its citizens' rights.

Classical conservatism suggests that this approach does not pay sufficient attention to the risk of instability that arises whenever one's political arrangements are measured against an idealistic vision of justice. According to the classical conservative, no political system will ever live up to such a lofty vision, and the attempt to make it do so is liable to do more harm than good. Michael Oakeshott analyzed political rationalism from the classical conservative perspective in Rationalism in Politics and Other Essays (Oakeshott, 1991).

Another way to put this is that classical conservatism has a more negative or cynical conception of human nature than other political ideologies like liberalism or socialism. The progressive pursuit of more just social arrangements in line with a set of rational principles – liberal, socialist, or otherwise – is a dead end, according to classical conservatives, not only because the principles themselves are wrong, but because the limitations of human nature will prevent their realization in human history.

Two important points follow from this. First, this outlook emphasizes prudence over perfection. Prudence refers to the recognition of the limitations of what is possible. This is not to say that there is no concern with justice; it simply puts a greater emphasis than other ideologies on the dangers of redesigning society after a systematic blueprint. Indeed, one prominent conservative writer has even suggested that conservative politics has no proper "end in view" towards which all politics should strive, other than the continuance of social life (Scruton, 1980, p. 23). The social relationship, and the communal bonds that sustain it, has a life of its own and is therefore its own goal. It is for this reason that some classical conservatives prefer to speak of conservatism as a disposition or attitude rather than as an ideology.

Second, there is no single political system that will work in all times and places. Because there is no universally applicable blueprint for the perfect political system, every society ought to be governed according to principles that naturally and organically arise out of its own history, culture, and traditions. The danger of imposing a foreign political system on a society, as proponents of democracy promotion overseas have discovered, is that eliciting broad social support for its rules and institutions is overwhelmingly difficult when the ideas themselves are foreign. It is for this reason that conservatism prefers a closer fit between society and government, even if the resulting system may fall short of rational standards of justice. This hearkens back to the conservative's preference for social order over the risk of instability.

In practice, classical conservatives see traditional customs and political institutions as the best available guarantor of peace and stability. They are wary of political programs that threaten to replace existing institutions with entirely new ones, as Edmund Burke saw with the French Revolution and as United Empire Loyalists saw with the American Revolution. The founders of Canadian confederation were motivated by these classical conservative values. They struggled for Canadian self-government without getting rid of the parliamentary and constitutional traditions that had taken root in British North America. Their desire to pattern Canada's House of Commons and Senate after Britain's House of Commons and House of Lords, while remaining loyal to the Crown, are excellent examples of the classical conservative themes discussed above. In fact, Canada's classical conservative – or high Tory – heritage is one important factor in accounting for the difference between Canadian and American conservatism. This has been referred to as the 'Tory touch' thesis (Horowitz, 1966).

Even though conservatism has evolved in recent decades, remnants of classical conservatism can still be found today. For example, contemporary conservatives often warn against the dangers of social engineering, by which they mean attempts by the state to alter the shape of society in accordance with a rational plan. Similarly, some defenses of the traditional family are based on classical conservative premises, such as the need to maintain the family as an important social institution. The raising and educating of children has traditionally taken place in the family unit, and hence most attempts to modify it are viewed with suspicion by many conservatives. As we turn to modern conservatism, it is important to remember that despite many changes, and even some outright reversals, in what is now considered as conservatism, the legacy of classical conservatism has not been completely eradicated.

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4.2: Modern Conservatism

Introduction to Modern Conservatism

Though I have noted some of the classical conservative tendencies that persist today, much of contemporary conservative discourse and policy making bears little resemblance to the outlook just described. In the decades following the Second World War, conservative political thinking changed drastically. The Reagan-Thatcher revolution in the 1980s saw a particularly pronounced shift away from classical conservatism. Classical conservatism could be called socially conservative in that it prioritized protecting society from threats to long-standing institutions and practices. It was not, however, economically conservative in the way that phrase is used today. Classical conservatives were generally not opposed to state intervention in the economy whenever such intervention could strengthen social bonds or promote the common good. Writers in Canada's high Tory conservative tradition particularly emphasized this point.

Reagan-Thatcher Revolution

Under the political leadership of British Prime Minister Margaret Thatcher (1979–1990) and American President Ronald Reagan (1981–1989), conservatives moved more fully in the direction of free markets, deregulation, and a business-first approach to statecraft. Most political problems were understood to arise from an excess of government regulation and activity, so the overriding policy aim of the Thatcher and Reagan governments was to unleash private market forces to areas previously under the purview of government oversight. President Reagan perfectly encapsulated the governing philosophy of the Reagan-Thatcher Revolution in his first inaugural address on January 20, 1981: "Government is not the solution to our problem, government is the problem."

Modern conservatism retains some hints of classical conservatism but combines them with elements of classical liberalism, most notably the emphasis on limiting state interference in economic matters. Modern conservatism is also notably more ideological and rationalist than its classical counterpart. There are many different perspectives and outlooks in the New Right, but two important versions of modern conservatism will be considered here: libertarianism and neoconservatism.

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4.3: Libertarianism

Introduction to Libertarianism

Although libertarians make up a sizable portion of today's conservative movement, they nevertheless sit uneasily within it. They embrace the free market and small government ideals of other conservatives, but they do not always agree with the social conservatism of other groups, particularly when it is used to justify the restriction of individual freedoms. We will return later to the theme of tensions within or between conservative groups.

Social Conservatism

Social conservatism refers to a multifaceted set of political concerns, all of which are related to the broad aim of protecting society from threats. These threats come in different forms, and different types of social conservatives are worried about some threats more than others. First, there may be some moral threats to society against which the government should act. These can include pornography, profanity, and gratuitous violence in films and video games. Second, some threats may be cultural in nature. The preservation of a culture is often accomplished by using the education system to inculcate each new generation into the values of the political community. Some conservative opposition to immigration also stems from this concern to preserve a particular culture. Third, there may be general threats to social cohesion and communal loyalty, against which many social conservatives are on guard. For example, some conservatives worry that the rise of individualism can weaken social bonds and the sense of community that is required to maintain social health. Excessive economic inequality can also weaken the feelings of mutual loyalty between the rich and poor.

It is important to point out that social conservatism can be motivated by either religious or secular concerns. Much of today's social conservative movement happens to be religiously based, for example in many religious groups' opposition to abortion and same-sex marriage, but there is nothing inherently religious about social conservatism

Libertarianism is anti-statist. This does not mean it opposes the existence of the state as such, but it prefers to limit its activity to a carefully defined sphere and demands that it not unnecessarily interfere with citizens' lives. Rather than enforcing a particular set of outcomes, libertarians believe the state should instead allow individuals' interactions and decisions to transpire as they will within a neutral set of legal rules that is enforced fairly and equally. Libertarians therefore agree with classical conservatives about the danger of social engineering or using the state to produce desired outcomes. Modern conservatism makes a distinction between equality of opportunity and equality of result. It endorses legal equality, in which everyone has the same legal freedom to pursue life projects and seek wealth, but it rejects the notion that the state must actively redistribute wealth to eliminate real inequalities.

Differences between Libertarianism and Classical Conservatism

After the similarity concerning social engineering, however, major differences emerge between libertarianism and classical conservatism. According to the latter, the libertarian emphasis on the free market and individual rights allows markets to have a corrosive effect on social cohesion and moral character. For example, excessive economic inequality, which often results from unregulated markets, can lead to a breakdown in the social trust that is so important to classical conservatives. When faced with market forces that have a negative impact on the social fabric, classical conservatives often prefer state activity to protect social health, whereas libertarians prefer to let the market play out as it will.

Another difference is the ideological character of libertarianism. Libertarianism is a set of philosophical claims about the primacy of individual rights and proper limitations on what governments can justly do to their citizens. It is therefore comprised of universally valid claims about individual rights and the proper role of government that ought to apply everywhere. This contrasts sharply with the classical conservative emphasis on working within existing traditions to bring about reforms that are a proper fit for the society in question. It is difficult to see anything but a major difference between these views.

The important point here is that despite disagreements with other conservative outlooks, libertarianism has more in common with the New Right than with other contemporary political outlooks. Before starting the People's Party of Canada, Maxime Bernier was one of the more well-known libertarians in the Conservative Party of Canada. In the United States, Paul Ryan, Ron Paul, and Rand Paul are prominent libertarians in the Republican Party. On the other hand, it is difficult to find many self-described libertarians

in today's left-of-centre political parties.

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4.4: Neoconservatism

Introduction to Neoconservatism

Neoconservatism is a distinct political movement that has its roots in a group of New York intellectuals who attended City College of New York in the 1930s and 1940s. Among them was Irving Kristol, who has been called the Godfather of Neoconservatism. Neoconservatism has been particularly influential in American politics, though Canadian conservatives have taken in some neoconservative influences as well. The 'neoconservative persuasion', as Kristol called it, was decidedly anti-communist. Moreover, the US-led victory over fascism in World War II gave neoconservatives a favourable impression of the moral role of American power in the world. These two distinct elements combined to create a distinct political outlook that was neither libertarian nor classically conservative. It shares libertarianism's emphasis on free markets, privatization, and economic growth, but is much more comfortable with a strong state in other areas, including criminal justice, foreign affairs, and cultural issues.

Domestically, neoconservatism stresses the importance of law, order, and traditional cultural values. In practice, neoconservatives have acted on these values by supporting strong and active police forces, harsh criminal punishments, and government censorship of pornography and other materials that would threaten traditional values. Neoconservatives see education and public morality as proper concerns of the state , and neoconservatives believe that a healthy democratic culture can only be preserved if the state takes an active role in preserving it. These are clear similarities to classical conservatism's emphasis on the preservation of social health.

Neoconservatism and Foreign Policy

Neoconservative foreign policy is worth discussing here, since this is the issue over which it has received the most criticism in recent decades. Three main points will clarify the neoconservative approach to foreign affairs. First, global politics is understood through the lens of friends and enemies. It is of utmost importance for neoconservative leaders to understand who their friends and enemies are. This may be a product of the Cold War environment in which neoconservatism took shape; the world at this time was sharply divided between rival blocs, each of which was seeking the destruction of the other. After the end of the Cold War, neoconservatives were behind the movement to frame radical Islam as a global threat, much in the same way as Soviet communism had been understood.

Second, neoconservatism is distrustful of international organizations and sees them as a possible bridge to tyrannical world government. This is especially the case when they attempt to constrain behavior that neoconservatives see as in the United States of America (thereafter: America)'s best interest.

Finally, since America was influential in bringing the Second World War to what they perceive as a moral conclusion, neoconservatives see a special role for America in the world. Because of this, they pay close attention to the internal politics of other states and prioritize the global promotion of democracy and political liberty. This is related to a broader theme in American politics known as American Exceptionalism, or the idea that America is set apart from other nations due to its unique emphases on democracy and political liberty.

Two comments can be made regarding neoconservative foreign policy. First, the 2003 invasion of Iraq, arguably the best-known event in the neoconservative foreign policy legacy, is a foreseeable consequence of these principles. It is easy to see how the distrust of international organizations and the goal of spreading American-style democracy could have increased support for the Iraq War. Second, the above themes point to the ideological nature of this outlook. Neoconservatism at its core is strongly anti-communist and believes in a universally valid set of political ideals that should be in place everywhere. It differs significantly from classical conservatism in this aspect.

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4.5: Conservatism in the Future

Looking Ahead for Conservatism

This chapter has highlighted some of the many varieties of conservative political thought. There is not one form of conservatism, but many. Multiple groups and perspectives lay claim to the label, and although there are some commonalities there are also deep political and philosophical differences. Moreover, it is of little use to group them all under the category "right wing," since some ideas that have been espoused by conservatives bridge the left-right divide that currently shapes political discourse in advanced democracies; this is especially so with classical conservatism. As noted above, Canadian classical conservatives have advocated for policies that are recognizably left-wing, such as support for labour unions, government regulation to reduce economic inequality, and stronger environmental regulations. Eugene Forsey and George Grant, two influential writers in this conservative tradition, strongly supported the Co-operative Commonwealth Federation, the precursor to today's left-wing New Democratic Party. This is not just a Canadian phenomenon; classical conservatism generally prefers a more activist state than do many of today's right-wing parties.

There are differences and tensions within today's conservative parties, too. A major fault line divides libertarians from both social conservatives and neoconservatives. Libertarians prefer limited government involvement in the personal affairs of private citizens and are thus more willing to support, for example, the legalization of abortion and same-sex marriage. Social and neoconservatives, on the other hand, feel that it is the government's duty to preserve traditional values and hence are more likely to oppose these practices. The conservative split over social issues can be seen in the level of support for Bill C-7, an Act to amend the Criminal Code (medical assistance in dying) that was passed by the Canadian House of Commons on December 10, 2020.[1] This bill would relax some of the safeguards around medical assistance in dying, including the requirement that a person's death be reasonably foreseeable in order to be eligible. There was almost complete unanimity within all parties except for the Conservative Party of Canada, which saw almost 13% of MPs (15 of 118 MPs) break from their colleagues to support the bill. The Liberals, by way of comparison, voted 142-2 in favour of Bill C-7.[2] The relative diversity of the Conservative Party, at least on some social issues, reflects the differences between the varied political outlooks that have come to call themselves 'conservative'.

The future of conservatism is likely to be very different from its past. The rise of populism has been particularly influential among conservative parties in many advanced democracies. Populism itself is not a new political attitude, but it has reshaped the political landscape in recent years. There are competing definitions of populism, but most accounts agree that it is based on a core distinction between the elites and everybody else. Cultural, political, and business elites are working against the interests of the common people, and populists seek to restore political power and influence to ordinary people. Donald Trump's presidency was largely a populist phenomenon, as is the Brexit movement in the UK. In both cases, much of their public support arose out of frustration with the failure of political elites to understand and serve the needs of the common people. For a more detailed analysis of populism, see chapter 7 in this book.

For our purposes, the relevant questions are the following: Does the populist turn represent a lasting change in mainstream conservatism, and, if so, how does it differ from classical conservatism and the New Right? These are complex questions that cannot be fully answered here. However, whatever becomes of populism within conservative parties in the future, it will probably be one of multiple factions competing for influence alongside libertarianism, neoconservatism, and others. From our current vantage point, we can safely say that right-wing populism is here to stay. Its many differences from other conservative outlooks may create difficult problems for conservative parties. Populists do not see eye-to-eye with libertarians or neoconservatives on important issues like the role of the state in regulating the economy, the importance of global military action, or the value of adhering to traditional norms of constitutionalism and liberal democracy. It is not clear how the Conservative Party of Canada or the American Republican Party will manage this emerging perspective or whether they will be able to agree on a consistent set of policy proposals, but this dynamic is likely to be the defining feature of conservative politics for the foreseeable future.

[1] At the time of writing, the Senate has passed the bill with some amendments. The House of Commons must now consider the amended version of the bill before it can receive royal assent and become law.

[2] More information on Bill C-7, including the text of the bill and voting records, can be found on the "LEGISinfo" section of the website for the Canadian Parliament: https://www.parl.ca/LegisInfo/Home.aspx?Language=en&ParliamentSession=43-2.

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- **American Exceptionalism:** The belief that the United States holds a unique position among nations due to its specific emphasis on democracy and political liberty.
- **Authority:** A form of legitimacy that distinguishes itself from mere power; it requires that subordinates respect their superiors while superiors have an obligation to behave in a way that preserves that legitimacy.
- **Classical Conservatism:** A political ideology that emphasizes the importance of tradition, hierarchy, and authority to maintain social order, viewing society as an organic entity rather than a collection of individuals.
- **Hierarchy:** The principle that a stable social order requires some degree of stratification, meaning some members of society will naturally have more social or political power than others.
- **Human Imperfection:** The foundational conservative belief that humans are fallible and motivated by feelings, customs, and selfish interests as much as by reason, making abstract, rational political blueprints impractical.
- **Libertarianism:** An anti-statist branch of modern conservatism that champions individual rights and free markets, seeking to limit government activity to a very narrowly defined sphere.
- **Modern Conservatism (New Right):** A version of conservatism that emerged prominently in the 1980s, combining some traditional values with a strong emphasis on **free markets**, **deregulation**, and limited state interference in the economy.
- **Neoconservatism:** A movement that supports free-market capitalism but is comfortable with a strong state to enforce domestic law and order and an interventionist foreign policy to promote democracy abroad.
- **Organic Theory of Society:** The concept that the state functions like a living organism where all parts must perform their specific functions for the whole to flourish, and where change must be slow and incremental.
- **Political Rationalism:** The approach of designing political and moral systems based solely on universally valid principles of reason, a method classical conservatives reject in favor of tradition.
- **Populism:** A political attitude centered on a sharp distinction between "the elites" (cultural, political, and business) and "the people," aiming to return power to ordinary citizens.
- **Prudence:** A political virtue emphasizing the recognition of the limitations of what is possible and prioritizing the continuance of social life over the pursuit of abstract perfection.
- **Reagan-Thatcher Revolution:** The political shift in the 1980s led by Ronald Reagan and Margaret Thatcher that moved conservatism toward a "business-first" approach and the belief that "government is the problem".
- **Social Conservatism:** A set of concerns aimed at protecting society from perceived moral or cultural threats—such as pornography or the erosion of the family—to maintain social cohesion.
- **Social Engineering:** State-led attempts to intentionally redesign or alter the structure of society according to a rational, centralized plan.
- **Tory Touch:** A thesis suggesting that Canada's political culture is distinguished from the United States by a stronger heritage of classical conservative (high Tory) values and institutions.
- **Tradition:** The accumulation of practices and modes of thought that have stood the test of time, serving as a "partnership between the living and the dead" and a guide for gradual social change.

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4.8: Discussion Questions

1. Given the significant differences between classical conservatism (which emphasizes organic society and tradition) and modern conservatism (which focuses on free markets and limited government), does it still make sense to group them under a single label? What core values, if any, do you think still bind these diverse factions together?
2. Classical conservatives argue that political reform should be gradual, incremental, and rooted in a society's existing traditions. How would a conservative following this logic respond to modern arguments that certain institutions are "structurally racist" or fundamentally flawed and require immediate, radical overhaul rather than slow reform?
3. Libertarians prioritize individual rights and free markets, even when they have a "corrosive effect" on social cohesion. Conversely, classical conservatives and neoconservatives are often willing to use the state to protect traditional values or social health. In your view, which approach better maintains a stable and just society?
4. Many traditional conservatives argue that right-wing populism is not "truly" conservative because it often clashes with established norms of constitutionalism and global cooperation. Do you believe populism is a legitimate evolution of the conservative tradition, or does its focus on the divide between "the elites" and "the people" represent a fundamental break from conservative principles?

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5: SOCIALISM

Introduction

Socialism emerged at the beginning of the 19th century in the context of the Industrial Revolution and the rise of capitalism. In two hundred years, it has spread to most of the countries of the world and contributed to extensive social changes. This emergence has given rise to important ideological diversity since many currents are related to it, such as communism, social democracy and eco-socialism. This chapter highlights the distinctive characteristics of socialism while relaying the differences between the currents that claim to be socialist and the contemporary challenges they face.

This chapter explores the historical evolution and ideological diversity of socialism, a movement born from the Industrial Revolution that envisions society as an egalitarian community striving for the common good. The text outlines fundamental internal divisions, such as the conflict between utopian idealism and scientific Marxism, as well as the split between revolutionary communism and reformist social democracy. Key figures like Karl Marx, Robert Owen, and Vladimir Lenin are discussed to illustrate how different factions approach the abolition of capitalism and the role of the state. Moving into the modern era, the sources examine how socialist thought has adapted to contemporary issues like environmentalism, feminism, and globalization. Today, the movement continues to reinvent itself through eco-socialism and the "third way," balancing traditional redistributive goals with new societal challenges.

Learning Objectives

- Define the fundamental "socialist core": Explain the shared conception of society among socialist currents as an egalitarian human community that aspires to the common good through social progress. This includes understanding the socialist critique of capitalism as an oppressive system of domination and the overarching goal of social emancipation.
- Distinguish between the major historical currents and divisions of socialism: Identify and analyze the three primary ideological splits: idealistic (utopian) versus rationalist (scientific) currents; anti-statist versus statist currents; and revolutionary versus reformist currents.
- Identify key socialist thinkers and their specific contributions: Name and explain the theories of influential figures, such as Robert Owen and the cooperative movement, Karl Marx and scientific socialism, Mikhail Bakunin and anarcho-collectivism, and Eduard Bernstein and revisionist social democracy.
- Analyze the evolution of socialism in response to 20th and 21st-century challenges: Evaluate how socialism has adapted to modern issues, including the rise of eco-socialism as an alternative to productivism, the debate over globalization (including the "third way"), and the integration of feminist and multicultural perspectives.
- Assess the current state and resilience of socialism: Discuss the reported decline of traditional socialist and communist parties while highlighting the ideology's capacity to reinvent itself within the context of more open, globalized, and technologically advanced societies.

5.1: The Socialist Core

5.2: The Diversity of Socialism

5.3: Utopian Socialism

5.4: Libertarian Socialism

5.5: Communism

5.6: Social Democracy

5.7: Socialism Today

5.8: Productivism vs. Environmentalism

5.9: Globalization vs. Anti-Globalization

5.10: Socialist Feminism

5.11: Multicultural and Nationalist Issues
5.12: Conclusion
5.13: Glossary
5.14: References
5.15: Discussion Questions

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5.1: The Socialist Core

Introduction to Socialism

Socialism is an ideology that is difficult to define since it incorporates many currents that are sometimes antagonistic and often contradictory. However, all the currents that claim to be socialist share the same conception of society, which they perceive as an egalitarian human community that aspires to the common good through social progress.

Socialism thus envisages changing today's society. For this reason, it is critical of capitalism, which is seen as a system that allows those who hold the means of production to establish their domination. In the face of capitalism, socialism advocates for emancipation, which means "overcoming obstacles in the path of self-control; a release from waged production (...); and the consequence enabling of self-realization within a social framework, which exploitation and alienation had impeded" (Freeden, 1996, p. 456). This desire for emancipation leads socialism to oppose any other forms of power deemed oppressive, whether they originate from the state, the market or any other institution.

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5.2: The Diversity of Socialism

Socialisms

From this common basis, the currents claiming to be socialist have many differences. Three historical divisions can be observed: the first was between idealistic (or “utopian”) and rationalist (or “scientific”) currents, the second between anti-statist and statist currents, the third between revolutionary and reformist currents. To illustrate these divisions, this section will describe the four main historical variants or currents that have dominated the debates: utopian socialism, libertarian socialism, communism and social democracy.

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5.3: Utopian Socialism

Introduction to Utopian Socialism

The first division was established by Friedrich Engels ([1876] 2020), who contrasts “utopian” currents that seek to transform society through an ideal organization with “scientific” currents that seek to correct it through scientifically elaborated solutions. Although this categorization seeks to undermine the credibility of the so-called “utopian” currents, since Friedrich Engels refers to them as unrealistic, the fact remains that socialism is divided between idealistic and more pragmatic currents. Historically, utopian socialism included several currents with different philosophical influences, but with the common point of wanting to establish ideal communities. Utopian socialists included several authors of the first half of the 19th century who are perceived as the precursors of socialism, such as Saint-Simon and Robert Owen.

Saint-Simonism: the workshop utopia

Claude-Henri de Rouvroy Count de Saint-Simon (simplified to “Saint-Simon”) is perceived as a “utopian” author by Marxist thinkers because his perspective integrated a religious dimension or more specifically a scientism based on the belief that the law of gravitation is the foundation of all things. Beyond this aspect, Saint-Simonism wished to create a society in which the social classes would join together to manage the nation in the collective interest. Industry would be thought of as the engine of such a society, with politics existing only to maximize it. To do this, Saint-Simon imagined a parliament composed of three chambers: a chamber of inventors who conceive projects, a chamber of scientists who examine the projects, and a chamber of industrialists who adopt and execute them. Society would be similar to a workshop in which everyone works together, fulfilling his or her role. However, Saint-Simonism is not deterministic, as it suggests that social elevation is the consequence of work. Therefore, it does not establish any inequality based on gender, birth, wealth or cultural criteria. Saint-Simon has influenced many authors from both the left and the right. Karl Marx took up several Saint-Simonian concepts (Durkheim 1958–2018), including the notion of social class.

Owenism: the co-operative movement

Robert Owen also belongs to the authors who qualified as “utopian” by Engels. He is the inspirer of the cooperative movement generally referred to as “Owenism”. In Robert Owen’s perspective, “innovations included the upbringing of children, the approach to crime, the design and location of buildings and leisure facilities, the relationships between the sexes, and the way in which work was organized. His claim was that by introducing such changes, based on the principles of rationality and cooperation, behaviour would be transformed” (Newman, 2005, p. 11). Although this approach aspires to change society through cooperatives, that is, communities in which the tools of production, work and property are collective and advocate for the complete equality of their members, Owenism rejects the idea of revolution and is circumspect about the political organization of society (Rogers, 2008). Robert Owen is often seen as the father of British socialism since the Fabian Society, which created the Labour Party, was inspired by him. From Tony Blair to Jeremy Corbin, all trends within New Labour are now claiming Owen’s legacy.

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5.4: Libertarian Socialism

Introduction to Libertarian Socialism

The second division of socialism comes from the conflict between the “anti-statist” and “statist” currents during the First International. Founded in 1864, the International Association of Workers (known as the “First International”) aspired to unite the labour movement in most European countries and in the United States of America. Very quickly, this movement was divided into three tendencies: Pierre-Joseph Proudhon’s mutualism, Mikhail Bakunin’s anarcho-collectivism and Karl Marx’s socialism or Marxism. Both Pierre-Joseph Proudhon’s mutualism and Mikhail Bakunin’s anarcho-collectivism are part of the libertarian tradition since they both aspire to the immediate abolition of the state, while Marxism sees the state as a transitional instrument used to get rid of capitalism. Although anarchist in their orientation, mutualism and anarcho-collectivism aspire to an egalitarian society marked by social progress, i.e. socialism.

Mutualism

If mutualism is critical of private property, it must be differentiated from Robert Owen’s cooperative movement. Indeed, Pierre-Joseph Proudhon rejects the idea of owning property because property is capital that allows one to receive an income through this collective force that is labour. To free themselves from capitalism, workers must organize production themselves. Mutualism proposes to offer capital without interest so that only labour generates value. Pierre-Joseph Proudhon sees in federalism the political continuity of mutualism. Federalism is based on a federation’s contract in which individuals bind themselves by a common obligation and commit to providing resources only to those they receive, but they also retain their sovereignty. Pierre-Joseph Proudhon’s libertarian socialism is thus based on the principle of autonomy, but it is also on an individualistic conception since the community is ultimately the result of individual will. After individuals have formed communities, they gather into territorial entities which federate themselves by pooling public services, establishing the mutuality of credit and tax equalization. Proudhon offers here a model of a stateless society, which “consists in the fact that, as political functions are reduced to industrial functions, social order would result solely from transactions and exchanges” (Proudhon, 1863, p. 20). The philosophy of Pierre-Joseph Proudhon inspired several theorists of socialism after him, the most famous being Karl Marx. He would conceive his notions of property, capitalism and the alienation of the working class on the basis of Proudhonian theory.

Anarcho-Collectivism

Taking up the concept of anarchy from Pierre-Joseph Proudhon, Mikhail Bakunin vigorously opposes Marxism. Indeed, he criticizes Karl Marx’s vision of a stateless society after a transitional phase called the “dictatorship of the proletariat” that would use the state to break with capitalism and bourgeois society. Mikhail Bakunin writes on this point: “Both the theory of the state and the theory of so-called revolutionary dictatorship are based on this fiction of pseudo-popular representation – which in actual fact means the government of the masses by an insignificant handful of privileged individuals, elected (or even not elected) by mobs of people rounded up for voting and never knowing what or whom they are voting for – on this imaginary and abstract expression of the imaginary thought and will of all the people, of which the real, living people do not have the faintest idea” (Bakunin, [1873] 2020). Proposing to destroy the state that he perceives as the counterpart of capitalism, Mikhail Bakunin favours an anarcho-collectivist model. For him, the revolution necessarily begins with the abolition of private property, the pooling of the means of production and the self-management of the agricultural and industrial sectors. Individuals then would come together in autonomous federations based on their common identity, interests and aspirations. Mikhail Bakunin’s philosophy is egalitarian to the point that he aspires to destroy religions, because they create social hierarchies and prevent absolute freedom of conscience.

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5.5: Communism

Introduction to Communism

The third division separates the “revolutionary” currents, for which the break with capitalism necessarily involves revolution, from the “reformist” currents, which aspire to transform social and political institutions by peacefully gaining power. This division was shaped in the 19th century and took on considerable importance with the Russian Revolution of 1917 and the creation of the Communist International (Third International) in 1919. The Third International’s membership provoked a definitive split between revolutionary and reformist currents within the labour movement.

Socialism or Communism?

What is communism and how does it differ from socialism? Before the creation of the Third International in 1919, there was no clear distinction between socialism and communism. Certainly, on a conceptual level, Karl Marx and Friedrich Engels explain that socialism corresponds to a historical phase in which a permanent revolution will lead to the advent of communism; they describe this as an ideal society, liberated from capitalism, without class or state. In fact, Karl Marx and Friedrich Engels rarely use the term “communism” in their writings, especially after the League of Communists, – which they joined in 1847 and for which they wrote the political program: *The Manifesto of the Communist Party* ([1848] 1969), – was dissolved in 1852. Moreover, Karl Marx and Friedrich Engels – as well as their direct successors commonly called “Marxists” – did not define themselves as Communists. It is therefore difficult to speak of communism before 1919 and preferable to speak of socialism.

Before Communism: Marxism

So then, what is Marxism? Karl Marx himself defines his ideology as “scientific socialism” that is socialism based on a scientific analysis of human societies. From this analysis, Karl Marx proposes a materialist conception of history, perceiving it as the perpetuation of the class struggle. He explains that the changes in modes of production: slavery, feudalism, then capitalism, create struggles between a dominant class and dominated classes. In the era of capitalism, domination is achieved through labour. For Marx, the value of a good is determined by the material cost of production and the labour necessary to produce it. However, the bourgeoisie that owns the means of production – that is, the capital – determines the value of a good not according to the value of production, but according to the value of exchange. And this exchange value includes the remuneration of capital. To remunerate itself, capital attributes to itself surplus value or the difference between the value added by the worker to the good and the value of the labour-power necessary for its production. The holding of capital is therefore the spoliation of the labour of others.

For Karl Marx, the constant search for profit leads to the accumulation of capital, which causes the impoverishment of the proletariat. Becoming aware of itself as a social class, the proletariat turns against the bourgeoisie. This is class struggle. The proletariat, however, is not only exploited: it is alienated by the bourgeoisie. The state, the nation, religion and collective values are shaped to establish the domination of capitalism and to comfort the bourgeoisie in its privileges. This is why Karl Marx and his followers advocate for a revolution to overthrow the existing system and build a truly socialist society in which the means of production are collectivized. Before that, the proletariat must come to power. The dictatorship of the proletariat, conceived by Karl Marx as a transitional step toward socialism/communism, is organized on the model of a revolutionary democracy in which every proletarian has a voice. In this way, it would restore equality and deconstruct capitalism.

The Bolshevik Revolution and its consequences

Communism was clearly different from socialism under the influence of Vladimir Ilyich Ulyanov (known as Lenin). Lenin develops the concept of the dictatorship of the proletariat theorized by Karl Marx in order to propose a proletarian state that would help establish a communist society. Lenin suggests that this state can be called communist “as the means of production becomes common property, the word ‘communism’ is also applicable here” (Lenin, [1917] 1999), adding that it is certainly not integral communism. Thus, in Lenin’s vision, a political regime can be qualified as “communist”, though only imperfectly so.

Serving to justify the Russian Revolution of 1917 and the creation of the Soviets, Lenin’s interpretation of Marxism earned him several criticisms, including those of Rosa Luxembourg and Karl Kautsky, heirs of Karl Marx’s philosophy. In addition to justifying

the possibility of a communist regime, Lenin believes that the proletarian revolution must be organized on a vanguard, a party of professional revolutionaries, that pursues the objective of taking power. Communism is no longer just a regime; it is a party. This idea, which is set out in his pamphlet *What is to be Done?* ([1902] 1961), is, once again, at odds with orthodox Marxism, which argues that revolution must emanate from the social movement.

Lenin succeeded in imposing the idea that the Bolshevik Revolution was the beginning of a world proletarian revolution. According to him, the Bolshevik Revolution was the concrete perspective of communism. Other revolutions, such as in China (1949), Cuba (1961), Vietnam (1954) and Yugoslavia (1945), led to the creation of singular communisms. In spite of their differences, all were inspired by Marxism-Leninism; that is, they were founded by a revolutionary party centered on a vanguard, the internationalism of the workers' movement, the dictatorship of the proletariat as the basis for the self-emancipation of the working class and collectivism as the pooling of the means of production.

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5.6: Social Democracy

Introduction to Social Democracy

Much like “communism” until 1919, social democracy was not clearly distinguishable from socialism. As a polysemous expression, it referred to both socialist parties and “reformist” currents that proposed to gradually transform society through democratic institutions. Social democracy evolved in several contexts, most notably in the debate between orthodox Marxism and revisionist Marxism that took place in Germany at the beginning of the 20th century, which laid the groundwork for all social democratic currents.

The opposition between Lassallism and Marxism

German social democracy emerged with the creation in 1863 of Ferdinand Lassalle’s General German Workers’ Association (*Allgemeiner Deutscher Arbeiterverein*, ADAV). Although he was close to the League of Communists, Ferdinand Lassalle never shared the ideas of Friedrich Engels and Karl Marx. He believed that a democratic and socialist state is the ideal framework for the emancipation of the working class since such a state could organize production cooperatives to put an end to capitalism. Ferdinand Lassalle conceives universal suffrage – which was extremely rare in his time – as the instrument of this state revolution. Although Ferdinand Lassalle died prematurely in 1864, his influence on the development of German social democracy was immense.

The break between Lasallians and Marxists has not fully taken place yet. Because of the repression of the socialist movement, Lasallians and Marxists even ended up agreeing on a common platform at the Gotha congress in 1875. Strongly criticized by Karl Marx, who saw in it the stranglehold of Lassallism over the workers’ movement ([1875] 1970), the *Gotha Program* is one of the founding acts of German social democracy. From this program, the Social Democratic Party of Germany (*Sozialdemokratische Partei Deutschland*s, SPD) was born. Although it became illegal as a consequence of the anti-socialist laws proclaimed in 1878, the SPD continued to operate underground until 1890, when the ban on it was lifted.

Eduard Bernstein’s Revisionism

To avoid a new Gotha, Friedrich Engels entrusted one of his followers, Eduard Bernstein, with the task of writing the new SPD program. He partnered him with another emerging figure of Marxism: Karl Kautsky. While Karl Kautsky wrote the theoretical part of the program, Eduard Bernstein developed the practical part. Adopted the following year at the Congress of Erfurt, this program has an undeniable Marxist hue, though a gap between theory and practice is felt. In this respect, the *Erfurt Program* heralds the opposition between Kautsky’s orthodox posture and Bernstein’s revisionism. With the death of Friedrich Engels in 1895, Bernstein gradually developed reformist ideas. He published a series of articles between 1896 and 1898 entitled *Problems of Socialism* around a central question: Is revolution desirable? Following the lively debates his articles provoked within the SPD, he published a book: *Evolutionary Socialism* (1899), which marked a breaking point with orthodox Marxism.

While subscribing to scientific socialism, Eduard Bernstein believes that Karl Marx’s predictions have not been fulfilled: the proletariat has not become poorer and, on the contrary, a middle class has emerged. As times had changed, he insists that the analysis cannot be dogmatic and that it is necessary to take into consideration not only the evolution of the workers’ movement but also that of capitalism. In putting forward this rationality in the analysis, he wants to be reasonable in the face of the idea of a violent revolution and the dictatorship of the proletariat that would succeed it. Moreover, he believes that socialism not only fights for the emancipation of the proletariat but for society as a whole. Social democracy must integrate all the dominated classes, including the middle classes. Rather than revolution, Eduard Bernstein favours evolution. Thus, he conceives democracy as the principle of “the suppression of class government” (Bernstein, [1898] 1907). Nevertheless, this aim requires real democracy. To achieve it, Eduard Bernstein takes up the Lasallian thesis of universal suffrage expecting that it neutralizes the bourgeois character of the state to become an instrument of the general interest.

Social democracy elsewhere

Eduard Bernstein’s revisionism strains Marxist theory of its revolutionary elements while rehabilitating the Lasallian theses in order to put them back within scientific socialism. If Bernstein’s social democracy encompasses the context of Germany at

the end of the 19th and the beginning of the 20th century, the reformist currents in other countries are also drawn on local political ideologies to revise Marxist theses. In France, republican socialism is inspired by republicanism, utopian socialism and mutualism. In the United Kingdom, the labour movement is instilled by the Fabian Society articulating the heritage of Owenism and that of trade-unionism. In Italy, social democracy is the work of Filippo Turati, who developed a non-dogmatic reading of Karl Marx rooted in a progressive republicanism inspired by one of the fathers of Italian unification: Giuseppe Mazzini. In the United States of America, social democracy was built on the trade union and anti-segregationist movements. This broad diversity of local contributions makes it difficult to designate social democracy as a homogeneous current.

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5.7: Socialism Today

Socialism in Decline?

According to commentators, socialism is in decline. The facts seem to speak for themselves: utopian and libertarian currents are now marginal; after the fall of the Berlin Wall in 1989, most communist regimes collapsed or adapted to the market economy; communist parties in liberal democracies had to transform, abandoning the idea of revolution and Marxist references; and social-democratic parties recorded major electoral setbacks in the 2000s and 2010s. While this decline can be seen in all the historical currents of socialism, it is noticeable those who have been predicting its death since the 1990s were wrong. The resilience of socialism lies in its formidable capacity to adapt to social issues, of which it is ultimately only a political echo. Since 1990, socialism has been constantly adapting to a society in full mutation. New divisions have emerged, such as those opposing productivism and environmentalism, or globalization and anti-globalization. Similarly, socialism is reinventing itself through issues of feminism, multiculturalism and nationalism.

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5.8: Productivism vs. Environmentalism

The Work of Engels

In *The Condition of the Working Class in England* ([1844] 1969), Friedrich Engels developed an environmentalist critique of workers' working conditions, denouncing pollution, noise and odor issues. Despite this work being seen as a precursor of green socialism, socialism developed according to a productivist doctrine that sought to increase the means of production through the exploitation of resources and the domination of nature. With the development of the environmentalist movement in the 1980s, several authors such as André Gorz (1987) have emphasized that capitalism cannot be ecological because it is based on the production of goods with an exchange value, while the environment has a use value. It is important to subordinate exchange value to use value in order to refocus production on social needs and the preservation of the environment. Eco-socialism is an alternative to capitalist and socialist productivism. At the convergence of a social critique and an environmental critique, it renews socialist thinking. If part of the left has remained productivist, certain political formations – including post-communist parties – have evolved towards eco-socialism, such as the Left Party (Vänsterpartiet – Sweden), Die Linke (Germany), Syriza (Greece), La France Insoumise (France), Podemos (Spain) and the Democratic Socialists of America (United States).

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5.9: Globalization vs. Anti-Globalization

Divisions Caused by Globalization

In the 1990s and 2000s, globalization created a division within socialism. While some of the social democratic currents adhere to it, seeing in globalization the opportunity for a more regulated world thanks to international agreements and organizations, the emergence of a middle class in developing countries, and even the democratization of these countries with the help of soft powers such as culture, development, education, sport and technology, globalization is also seen as the upper stage of capitalism. Globalized companies are freeing themselves from states and imposing their neo-liberal ideology on them; an ideology that legitimizes private interests at the expense of the common good and the exploitation of developing countries, thus creating a globalized proletariat.

The anti-globalization movement is very heterogeneous and weakly organized. However, the *Porto Alegre Manifesto* produced at the 2005 World Social Forum lays out its main orientations, including the establishment of an international tax on financial transactions, the cancellation of public debts of developing countries, the guarantee of food security through the promotion of self-sufficiency and fair trade, the fight against racism in all its forms and the restoration of indigenous rights. The proposals of the anti-globalization movement – mixed with populism – find a certain echo in South American socialism, particularly in the Bolivarianism of Hugo Chavez, which is based on food and industrial self-sufficiency, a critique of the imperialism of developed countries and the recognition of indigenous rights.

The "Third Way"

The social democracy that adheres to globalization will develop the thesis of the “third way“. Theorized by Anthony Giddens and Tony Blair (1998), it considers that there is a place between the “old” statist and redistributive social democracy and deregulatory and unequal neoliberalism. Because globalization imposes economic, political and societal changes, this third way aims to accompany with them equal opportunities rather than egalitarianism and the delegation of public services to private companies in order to increase the state’s performance, but also a strong societal progressivism with the recognition of ethnic, national and sexual minorities. The third way corresponds ideologically speaking to social liberalism. It is being emulated almost everywhere in the West: German Chancellor Gerard Schröder was inspired by it from 1998 to 2005, as was US President Bill Clinton from 1993 to 2001 and French Prime Minister Lionel Jospin from 1997 to 2001.

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5.10: Socialist Feminism

Brief Introduction to Socialist Feminism

At the end of the 19th century, many women and men contributed to the development of socialism and linked the domination of capitalism to that of patriarchy, foreshadowing intersectionality. While it is necessary to underline the strong misogyny of certain socialist thinkers, conversely, August Bebel in his book *Woman and Socialism* ([1879] 1910) theorized the oppression of women from a Marxist perspective. But it was activists such as Claire Zetkin, the founder of Socialist International Women in 1907, and Alexandra Kollontai, a free-love theorist and an outspoken critic of the bourgeois family and sexuality (Free Love, 1932), who linked feminist struggles to proletarian struggles. Despite these efforts, feminist struggles were long relegated to the background by the socialist ideology. Socialist feminism underwent a revival in the 1980s, most notably thanks to the work of feminist intellectuals such as Marlene Dixon (1978). Through their militancy, the socialist and communist parties gradually integrated feminism into their platforms, making the right to abortion, the parity of political bodies and equality between men and women demands assumed by all socialist currents.

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5.11: Multicultural and Nationalist Issues

Ideological Contradictions within Socialism

To the historical divisions that oppose idealistic and rationalist, anti-statist and statist, revolutionary and reformist currents, we should add that of monism and pluralism. Socialism postulates that individuals are always reduced to their social class in a capitalist system since this system is based on the exploitation of the dominated by the dominant. Moreover, certain collective affiliations – such as cultures, ethnic groups, nations or religions – participate in domination because they degrade the dominated classes. According to this perspective, socialism is more or less receptive to the recognition of collective affiliations. To be precise, it oscillates between a monism that perceives the individual solely through the prism of his or her social class and aspires to unite the dominated in order to fight against the dominant, and a pluralism deemed emancipatory in the face of the bourgeois ideology and its corollary: imperialism. This underscores the many ideological contradictions within socialism and its currents.

The national question bears witness to this debate between monism and pluralism. For Karl Marx, there is a primacy of social class over any other historical category, including the nation. Nevertheless, Karl Marx acknowledges the existence of oppressed nations such as Ireland and Poland, both victims of imperialism. Austromarxism seeks to demonstrate that the national struggle is complementary to the class struggle. Thus, Otto Bauer ([1907] 2000) believes that nations are not naturally instruments of oppression. It is the bourgeoisie that creates nationalism in order to divide the workers' movement on an international scale and to maintain an artificial sense of belonging that does not allow the proletariat to recognize itself as a social class. According to Otto Bauer, a nation is both an association of individuals who share social and cultural characteristics (community of character) and common interests and history (community of fate). The working class must re-appropriate the nation in order not to cede its cultural goods to capitalism. The role of socialism is then to achieve international unity in national diversity. Otto Bauer thus pleads for a multinational state. Lenin re-appropriated the concept and, as early as 1917, declared himself in favour of the self-determination of nations within the Union of Soviet Socialist Republics (USSR). With its desire for world proletarian revolution, Marxism-Leninism then claimed to be the defender of the nations oppressed by capitalism. It inspired several national liberation movements, but also certain authors of decolonization such as Franz Fanon (1965).

It should be noted, however, that socialism has not been immune to hate speech. The anti-Semitism, colonialism, homophobia, misogyny, racism and xenophobia espoused by some theorists in the fight against capitalism cannot be excused, especially since some thinkers at the same period sought to emancipate oppressed minorities. This is the case of August Bebel who, in addition to advocating for the equality between men and women, pleaded for the legalization of homosexuality ([1879] 1910) and virulently denounced anti-Semitism in the ranks of socialism, which he called "socialism of fools". It was only with the decolonization movement, the anti-segregationist and anti-apartheid struggle, widespread immigration and the composition of an immigrant proletariat, and the numerous struggles for the recognition of minorities in the 1980s that socialism began to describe itself as pluralist.

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5.12: Conclusion

Concluding Remarks

This chapter highlighted the many interconnections and reciprocal influences between the currents of socialism. Since this ideology evolves with society and the demands of dominated groups, it offers an incredible diversity of perspectives enriched by the two centuries of history that have forged it, by the extremely varied local contexts in which it arose and was developed, by the internal conflicts that have occurred and continue to occur in it, and by the different philosophical traditions it has been able to integrate and that emanate directly from it. If socialism is declining as a political force at the beginning of the 21st century, we should not believe that it is an outdated, moribund ideology. On the contrary, it is reinventing itself in a context of more diversified, more open, more globalized societies, where economic and labour transformations as well as environmental and technological issues are generating new momentum. This new industrial revolution is leading to a re-reading of the theories formulated by yesterday's ideologues, hence the success of intellectual figures such as Thomas Piketty (2014). It will undoubtedly create the currents of tomorrow.

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- **Anarcho-Collectivism:** A libertarian model proposed by Mikhail Bakunin that advocates for the immediate destruction of the state, the abolition of private property, and the self-management of production through autonomous federations based on common identity.
- **Anti-globalization Movement:** A heterogeneous movement that critiques global capitalism as a form of imperialism and advocates for international taxes on financial transactions, debt cancellation for developing countries, and the restoration of indigenous rights.
- **Capitalism:** A system criticized by socialists for allowing those who hold the means of production to establish domination, leading to the exploitation and alienation of the working class.
- **Class Struggle:** The Marxian concept of perpetual conflict between a dominant class (bourgeoisie) and a dominated class (proletariat) created by changes in modes of production throughout history.
- **Communism:** Conceptually, an ideal classless and stateless society; politically, since 1919, it refers to regimes and parties centered on a revolutionary vanguard and the establishment of a proletarian state.
- **Cooperative Movement (Owenism):** An approach to social change that rejects revolution in favor of creating communities based on rationality and cooperation, where tools of production and property are collective.
- **Dictatorship of the Proletariat:** A transitional historical phase toward socialism/communism in which the proletariat takes power to deconstruct capitalism; Lenin adapted this into a formal "proletarian state".
- **Eco-socialism:** A modern current that combines social and environmental critiques, seeking to subordinate "exchange value" to "use value" to prioritize social needs and environmental preservation over industrial growth.
- **Emancipation:** The socialist goal of overcoming obstacles to self-control and achieving a release from waged production to enable individual self-realization within a social framework.
- **Exchange Value:** The market value of a good, often including capital profit, which eco-socialists argue should be secondary to the actual utility (use value) of products and the environment.
- **Federalism (Proudhonian):** A political model for a stateless society based on contracts where individuals and communities bind themselves by common obligations while retaining their sovereignty.
- **Globalization:** A process that has split socialist thought; some see it as an opportunity for international regulation, while others view it as the "upper stage of capitalism" that exploits developing nations.
- **Lassallism:** A current that believes a democratic state achieved through universal suffrage is the best framework for emancipating the working class through production cooperatives.
- **Libertarian Socialism:** An anti-statist tradition that aspires to an egalitarian society and the immediate abolition of the state, primarily through mutualism or anarcho-collectivism.
- **Marxism:** Also known as "scientific socialism," it uses a materialist analysis of history to advocate for the revolutionary overthrow of capitalism and the collectivization of the means of production.
- **Mutualism:** A libertarian theory by Pierre-Joseph Proudhon where workers organize production themselves and offer interest-free capital so that labor is the sole generator of value.
- **Productivism:** A doctrine historically followed by many socialist currents that focuses on increasing the means of production through the exploitation of resources and the domination of nature.
- **Reformism:** A current that seeks to transform social and political institutions peacefully by gaining power through democratic means rather than violent revolution.
- **Revisionism (Bernstein):** A reformist evolution of Marxism that argues socialism should focus on gradual, evolutionary social progress and integrate the middle classes rather than seeking a violent break with capitalism.
- **Social Democracy:** A reformist current that proposes to gradually transform society through democratic institutions like universal suffrage and social progressivism.
- **Socialism:** An ideology perceiving society as an egalitarian community aspiring to the common good through social progress, generally advocating for emancipation from capitalist domination.
- **Society (Socialist Definition):** An egalitarian human community that aspires to the common good through social progress.
- **“Third Way”:** A social-liberal thesis that seeks a middle ground between old statist social democracy and neoliberalism, focusing on equal opportunities and societal progressivism.
- **Utopian Socialism:** Idealistic currents (such as Saint-Simonism) that seek to transform society by establishing ideal communities or "workshop utopias" managed in the collective interest.
- **Vanguard Party:** A Leninist concept of a party composed of professional revolutionaries organized to lead the proletarian revolution and take political power.

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5.15: Discussion Questions

1. Compare and contrast the libertarian socialist rejection of the state (through Mutualism or Anarcho-Collectivism) with the Marxist and Leninist view of the state as a "transitional instrument" for deconstructing capitalism. Why did Mikhail Bakunin argue that a "revolutionary dictatorship" would inevitably lead to the government of the masses by a "handful of privileged individuals"?

2. How does the emergence of eco-socialism challenge the historical "productivist" doctrine that originally sought to dominate nature to increase industrial growth? Discuss the implications of André Gorz's argument that capitalism cannot be ecological because it prioritizes "exchange value" over the "use value" of the environment.

3. The sources describe the "Third Way" (social liberalism) as a middle ground that prioritizes "equal opportunities" rather than "egalitarianism". Does this approach still align with the fundamental "socialist core" of an egalitarian human community, or does it move too far toward the neoliberal ideology it seeks to regulate?

4. Historically, socialism often prioritized social class over other identities (monism), yet modern currents have moved toward pluralism by integrating feminist, multicultural, and nationalist issues. In what ways can a socialist movement balance the struggle against capitalism with the specific needs of oppressed cultural or gender-based minorities?

5. Despite the decline of traditional socialist and communist parties since 1990, the author argues that socialism is reinventing itself through a "new industrial revolution" and social mutations. Based on current global trends in technology and environmental crises, what characteristics do you believe will define the "socialist currents of tomorrow"?

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6: NATIONALISM

Introduction

The Latin term *natio*, Elie Kedourie reminds us, originally referred to “a group of men belonging together by similarity of birth, larger than a family, but smaller than a clan or a people [and] applied particularly to a community of foreigners” passing through a city or a village (Kedourie, 1961, p. 13). Over the centuries, the term eventually took on different meanings. Eric Hobsbawm asserts that it was only after the French Revolution in the 18th century that the concept acquired its current denotation, that of referring to “the people” in a positive way. This is when French citizenship became the principle of nationality, denoting individual rights and allowing an individual to declare a sense of belonging to a specific nation. Nowadays, the term “nation” most commonly refers to the people living within a political entity such as a state—a term not to be confused with that of a nation—whereas the term nationalism, as will be discussed, refers to the ideology of this form of communal belonging.

This chapter offers an overview of the field of nationalism studies. First, we will present the major theories of the field regarding the sociohistorical advent of nations and nationalism as well as its focus on meso and microsociological processes. Second, we will discuss the different types of nationalism and the main debating points of the field. Third, we will focus on the principal waves of nationalist movement observed between the 19th and the 21st century.

This text presents a comprehensive academic overview of nationalism, defining it as the drive to align political borders with cultural identities. It examines prominent modernist theories, such as those by Gellner and Anderson, which link the rise of nations to industrialization and print capitalism, alongside ethnosymbolic perspectives that emphasize pre-modern ethnic roots. Beyond historical origins, the sources explore "banal nationalism," or the subtle ways daily routines and symbols reinforce national belonging. Different categories are analyzed, including the classic civic versus ethnic divide, as well as contemporary forms like diaspora, homeland, and national populism. The material also traces historical waves of state-building from the French Revolution to modern independence movements, using the case of Quebec to illustrate these dynamics. Ultimately, the text characterizes nationalism as a highly adaptable ideology that remains a primary force in global politics and personal identity.

Learning Objectives

- Compare and contrast modernist and ethnosymbolic theories of nationalism, identifying how factors like industrialization, "print capitalism," and "ethnic cores" contribute to the formation of nations.
- Differentiate between various typologies of nationalism, moving from the classic civic-ethnic divide to contemporary categories such as homogenizing, state-seeking, homeland, and diaspora nationalism.
- Explain the concept of "banal nationalism" and analyze how everyday symbols—such as "unwaved flags"—and daily routines reinforce national belonging and social reproduction.
- Analyze the historical evolution of nationalism through its major waves, from the French Revolution and the 1848 "Spring of the People" to the post-Cold War era and the modern rise of national populism.
- Evaluate the case study of Quebec to illustrate the dynamics of state-seeking nationalism and how political movements can successfully transform a group’s collective identity.

6.1: Modernist and Ethnosymbolic Theories

6.2: Shifting Focus From Sociohistorical and Macro-Sociological Perspectives to Meso and Microsociological Analyses

6.3: The Ethnic-Civic Opposition and Its Limitations

6.4: Contemporary Typologies

6.5: Types of Nationalism - The Case of Quebec

6.6: Nationalism in Time and Space

6.7: Conclusion

6.8: Glossary

6.9: References
6.10: Discussion Questions

Attribution

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6.1: Modernist and Ethnosymbolic Theories

Nationalism as a Product of Modernity

The bulk of the theories on nationalism are based on the assumption, or come to the conclusion, that nations are products of modernity or a modern way of organizing policy. Ernest Gellner's *Nations and Nationalism* (1983) is the most well-known book that forwards this theory. Investigating culture in 18th century Europe during the industrialization era, Gellner observes that modern economies, or industrial cultures, require the ability to communicate between strangers in a standard idiom and a mobile division of labour that is able to rapidly learn new positions. To provide such a workforce, exo-education must become a universal norm. Only the communities that are able to sustain an independent educational system are then able to reproduce themselves. The state, the only institution capable of supporting such complex organizations, uses mass education to standardize a culture, that of the political elites, over a large-scale territory. In this sense, Gellner understands the homogenization of cultures through mass education as a necessary measure to meet the economic needs precipitated by industrialization. The homogenization of cultures, the way people understand the world and their position within this framework, is therefore unintentional. The consequences of this transformation are, however, durable. For Gellner, since the industrialization era, individuals have not been loyal to a monarch or a religion but rather a national culture. According to this logic, the state is only legitimate when it represents and protects this culture. While discussing Max Weber's theory of the emergence of states, Gellner argues that nowadays, the monopoly of legitimate violence is not as important to modern states as the monopoly of legitimate education. Acquiring the cultural idiom in a given state then becomes, Gellner argues, the basis of citizenship. By investing themselves in the mastering of the idioms of their culture, individuals unintentionally become nationalist.

Benedict Anderson, the author of *Imagined Communities* (2006 [1991]), emphasizes the role of print capitalism during the proto-industrial era in the advent of nations and nationalism. The diffusion of books published in printed languages, he argues, "created unified fields of exchange and communication below Latin and above spoken vernaculars. Speakers of the huge variety of Frenches, Englishes or Spanishes, who might find it difficult or even impossible to understand one another in conversation, became capable of comprehending one another via print and paper" (*ibid.*: 44-45). Creating new ways of linking fraternity and power, the homogenization of languages spread while two important cultural systems were losing influence: religions and dynasties. The demotion of such orders, combined with the rise of print capitalism, allowed individuals to project their life in a different perspective. Mass publication and print capitalism, in other words, created another representation of communal belonging by adjoining new symbols: a shared language and culture, but mostly a daily life marked by similar news, events, interests, and routines. In so doing, communities became "imagined" in the sense that a person from a given community—or a contemporary nation—will most likely never know or meet all of his or her compatriots, yet s/he can still imagine their existence and everyday life.

Unintended/Indirect Result of State Policy

The modernist school of thought in nationalism studies, as discussed through its main representatives, Ernest Gellner and Benedict Anderson, thus argues that the advent of nations as modern ways of belonging is the unintended or indirect result of state policies. Mainly enforced to sustain the necessary conditions for contemporary economies, this course of action inadvertently homogenized cultures. Nations and nationalism are then to be understood as unintentional consequences of industrialization that became, throughout the years, efficient means of bounding citizens and political elites. In a bid to supply what modernist theories lack, i.e. what is actually national, the ethnosymbolic school of thought further developed the field of nationalism studies. Its founder, Anthony D. Smith, agrees that nations are a modern phenomenon. However, he emphasizes their ethnic origins by arguing that they require the unifying myths, symbols and memories of pre-modern ethnicities (1987; 1991; 1998). The combination of these elements constitutes what he refers to as the ethnic core of a nation. The ethnic core of a nation, in his theory, is what makes it unique—whereas most of its other components, whether it be shared codified laws, common rights and duties, a unified economic zone, or a delimited territory, are interchangeable from one nation to another. The particularities of an ethnic core mark the difference between the concept of a nation and that of a state, a distinction that modernist theorists have rarely underlined. Hence, instead of examining the role of cultures as Gellner did, Smith explores what these cultures consist of and how their elements have come to be understood as national.

According to Smith, the keepers of traditions, individuals who are or who closely collaborate with the elites of a given political unit, have throughout history passed on cultural components that have come to form the ethnic core of a nation. By the end of medieval times, the culturally homogenous elite of a given territory began forming the core of what would become a state. Growing

in complexity, elites would influence the state's administrative, judicial, fiscal and military apparatus, whose expansion meant the annexation of culturally different territories. To strengthen their legitimacy, government leaders encouraged the assimilation of minorities so that their state could be perceived as a nation-state, an entity that represents and speaks for one people. What is hence precisely modern in the concept of nations, in Smith's theory, is the idea of merging a political identity with a cultural identity, endowing the nation as the basis of state citizenship.

Cultural and Political Nationalism

John Hutchinson, Smith's student, identifies two distinct processes within the advent of nation-states and argues that nationalism is a twofold phenomenon that mainly involves two types of actors with different yet complementary goals (1987). A first set of actors is engaged in "cultural nationalism." This form of nationalism is a response to the erosion of traditional religious and feudal identities. It attempts to regenerate the moral of the national community. The protagonists of cultural nationalism are mainly artists and scholars, such as historians, anthropologists, and political scientists. These "ethnic revivalists," by using the past, formulate the cultural ideals of the nation. The effectiveness of their endeavour rests on their ability to invoke and appropriate genuine communal memories while at the same time connecting them to specific homelands, cultural practices, and forms of sociopolitical organization. A second set of actors is engaged in "political nationalism." Their aim is to erect a rational and civic political community composed of equal citizens unified through shared idioms and laws. To do so, they transform the ideals formulated by the ethnic revivalists into political, economic and social programs. They mainly consist of politicians trying to legitimize an independent state or an independent state-to-be with the work of individuals engaged in cultural nationalism. They use ethnic sentiments to muster diverse groups and secure a representative national state. Although those two ideal types of nationalism convey different objectives, they complement each other: political nationalists require ethnic sentiments to be conceptualized, whereas cultural nationalists need channels to champion their findings—though the latter may sometimes be invented traditions (Hobsbawm and Ranger, 1983).

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6.2: Shifting Focus From Sociohistorical and Macro-Sociological Perspectives to Meso and Microsociological Analyses

Nationalism's Everyday Aspect

Ernest Renan, a French historian and philologist, was among the first scholars to address the nation as a concept. At a conference at the Sorbonne in 1882, he defined the nation as a modern historical construction that prompted, in conjunction with other numerous factors, a significant number of individuals to wish to live together under specific conditions while sustaining both the idea of a common past and a foreseeable future. For this idea to be successful, he noted, the nation must be a daily plebiscite. In spite of this somehow romanticized view on the matter, Renan raised an issue that was not properly addressed within the field of nationalism before the end of the next century: its everyday aspect. Only in the 1990s did a meso and micro-sociological turn take place, echoing back to Renan's position that regardless of how a nation came into being, its existence may rest on everyday plebiscites.

Banal Nationalism

A major work in the revitalization of this aspect of the nation is Michael Billig's *Banal Nationalism*. In this book, Billig defends the following thesis: "Nationalism, far from being an intermittent mood in established nations, is the endemic condition" (Billig, 1995, p. 8). Nationalism, he argues, is not a political phenomenon that only occurs during civil or international warfare; it is also at the core of the social reproduction of Western countries, even when under very subtle forms. This is the phenomenon he identifies as "banal nationalism," which covers the ideological habits that enable established nations to be reproduced. According to Billig, nationalism is not only associated with the pre-nation state era of a country; it is intrinsic to the everyday life of all inhabitants of a state. He argues that individuals are constantly socialized to the nation by means of different mechanisms, patterns, daily routines and symbols. Embedded in the everyday life of all inhabitants of a nation, these routines, rituals and symbols usually go unnoticed. In so doing, individuals never forget to which nation they belong, but they forget how they are consistently reminded of this belonging.

The most common symbol Billig employs to illustrate this specific type of nationalism is the flag. There are, according to him, two ways in which it is used. First, there is an active use of the flag: the waved flag. This expression refers to the most conscious use of the flag—or any other national symbols, signs, references, or lexicons—to assert a sense of national belonging or to make a statement involving the nation on occasions such as national holidays or international sports competitions. Second, there is a passive use of the flag: the unwaved flag. This term applies to a flag—or again any other national symbols, signs, references, or lexicons—that goes unnoticed, on a public building for example, but that reminds us unconsciously of our national belonging. Billig argues that everyday life is filled with waved and unwaved flags: the lexicon of politicians (us the nation, them another nation); the weather forecast, which geographically reminds us of where we are in our nation, but also in a world divided into nations; international sports competitions; or again wars between nations that fight for the liberty and freedom of the people of a nation.

The persistence of banal nationalism is, according to Billig, mostly orchestrated by the state, as its existence ultimately depends on it. Constructing banal nationalism in everyday life induces, he argues, citizens to work for the greatness of their nation. But most of all, it induces individuals to sacrifice their lives for their nation's cause, if needed, whence the significance for states to maintain a constant flagging of the nation it aims to represent and defend. For banal nationalism to reach its full efficiency, the nation not only needs to be celebrated on special occasions, but also on a daily basis.

Nationhood

Following Eric Hobsbawm's observation that nations, while constructed from above, cannot be understood unless also analyzed from below, Rogers Brubaker developed what he referred to as a cognitive approach to examine the nation both in everyday life and in a macro-sociohistorical perspective. This approach suggests focusing on nationhood rather than nations as groups. Instead of referring to nations as a category of analysis, Brubaker investigates the nation as a category of practice to understand how nationhood structures perceptions, informs thoughts and experiences, or organizes discourses and political actions. Groups, in this perspective, are not a constant but a variable that may become salient under different circumstances. The nation is hence

not a thing in the world, but a perspective on the world, among others. By investigating nationhood with this approach, Brubaker aims to prevent groupism, i.e., an analysis that automatically takes nations, races, or ethnic groups as basic units of analysis. In so doing, he avoids contributing to the mere static construction and reification of such groups through his investigations and rather provides a relational and processual understanding of nationhood. His investigation *Nationalist Politics and Everyday Ethnicity in a Transylvanian Town* (2006) examines nationhood with this cognitive approach both from above and from below.

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6.3: The Ethnic-Civic Opposition and Its Limitations

Civic and Ethnic Nationalism

A classic opposition in the history of political thought is between two types of nationalism: civic and ethnic. The first type, civic nationalism, is said to have developed in Western Europe and the United States. According to several historians of political thought, civic nationalism is the political force that led to democratic revolutions in France and the United States. It fosters the development of a horizontal solidarity of citizens, in theory, equal before the law, that identifies with the state and its constitutional legacy. It has strong roots in the political thought of the Enlightenment and liberalism. Civic nationalism values the identification of all citizens with the state. It has also been a political force behind the unification of many states. The second type of nationalism developed in Central and Eastern Europe. It is often referred to as a cultural, ethnic or organic nationalism. While civic nationalism is often associated with the Enlightenment, cultural nationalism is more generally associated with the romantic reaction to the Enlightenment. It fosters identification of the members of the nation with a given language, cultural tradition, and often ethnoreligious symbols. Under its more extreme variants, ethnic nationalism can lead to policies of ethnic cleansing and genocide.

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6.4: Contemporary Typologies

Nationalisms

Although the opposition between civic and ethnic forms of nationalism remains a useful ideal-type, sociologist Rogers Brubaker has contested its shortcomings (1998, pp. 298-301). Some, for instance, have argued that even when it appears to be inclusive and civic, nationalism is always promoting institutions and symbols that are not culturally neutral, for example: an official language, an official history, political institutions, a constitutional order or legal traditions. It is not because these institutions are not always contested that they are culturally neutral. In Canada, for instance, many institutions and traditions are part of the heritage of the British Empire and the head of the State remains the head of the British monarchy. Other scholars have stressed that the relations between states, nationalism and citizenship policies are always evolving. Germany has for a very long time been associated with ethnic nationalism and very restrictive citizenship policies. Yet, in 1999, it adopted a much more civic political culture and citizenship policies based on soil rather than blood.

Homogenizing Nationalism

Therefore, contemporary researchers of nationalism argue that it is sometimes necessary to move beyond the ethnic/civic divide in order to provide a better typology of different forms of nationalism. Civic nationalism or French Republicanism is sometimes better described as a homogenizing nationalism. The ideal-type of homogenizing nationalism refers to a fully recognized and institutionalized form of nationalism that provides the principal vector of integration to the political culture of a state. Since homogenizing nationalism is always at the core of a state's institutions, it becomes "banal" or "normal" for many observers. Ethnic nationalism, on the other hand, has often been prominent among members of a group who seek to build their own sovereign state. In this case, it is probably better to refer to a state-seeking nationalism. When many members of a policy share a different subjective understanding of their past, culture or collective memory, they can mobilize a state-seeking nationalism in order to secede from a state that does not recognize their cultural specificities.

Homeland Nationalism

Homeland nationalism is another variant of nationalism that occurs in peculiar geopolitical contexts. Homeland nationalism is the type of transborder mobilization used by a state towards ethnic minorities in neighboring states that "belongs" to the dominant ethnic group of the homeland state. This type of nationalism can become a core instrument of the homeland's state foreign policy. It can seek either the geopolitical annexation of another state's territory, a section of the territory or the political destabilisation of a foreign state's political regime in order to empower political forces more in line with the homeland state.

Diaspora Nationalism

Diaspora nationalism refers to the nationalist beliefs and nationalist practices of members of a diaspora who remain attached to another state that they consider their homeland. Diasporic nationalist practices can be directed toward an imagined homeland even if the actual members of the diaspora have never set foot in the actual state that they consider "their" homeland. The existence of diasporic nationalism emphasizes the fact that the nation is an imagined community and that it can be imagined from within the existing territory of a nation-state or from outside the actual territory of a nation-state.

National Populism

The term national populism is often used to refer to the core ideology of the European radical right that blends elements of nationalism, populism and authoritarianism. National-populist movements mobilize their membership along two axes: a horizontal axis where they galvanize the so-called "people" against the so-called "elites" and a vertical axis where they galvanize members of the nation against non-members, foreigners or minority groups. National-populists are also opponents of the counter-powers constitutive of a liberal democracy: an independent judiciary system, a free and diversified press, a constitutionalized division of power, and charters of rights. According to national-populists, these counter-powers have gained too much power in liberal democracies and are threatening the expression of the political will of the majority.

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6.5: Types of Nationalism - The Case of Quebec

Sovereignist Movement in Quebec

During the second half of the 20th century, Canadian politics was punctuated by important rounds of constitutional debate regarding the status of Quebec in the Canadian federation (Gagnon, 2004). In fact, the history of Quebec has been shaped by multiple episodes of political contention, several of which have implied republican or nationalist claims. In 1837, a political movement, Les patriotes, inspired in large part by the political institutions of the young United States of America, took arms in order to fight British troops in Lower Canada and demanded representative political institutions and an elected representative body. It was forcefully suppressed by British military forces. For most of the following century, the Catholic Church, the French-language, and le code civil remained at the core of French-Canadian identity. It was during the middle of the twentieth century that new political forces in Quebec merged into a state-seeking nationalism. They opposed what they perceived as linguistic and economic oppression caused by an Anglo-dominated Canada bestriding the political institutions of the Dominion.

During the nineteen sixties, the Révolution tranquille swiftly transformed the relationship between the province and the Catholic religion and its clergy, leaving the door wide open for outside influences and Quebecers eager for novelty. Alongside this, an important national-liberation movement took root. The once-disparate movement promptly consolidated into an influential political formation during the nineteen seventies, le Parti Québécois. Since then, important constitutional litigations (such as the Meech Lake Accord and the Charlottetown Accord) as well as two referendums have been held in Quebec on the status of the province in Canada. At the core of the referendums was the idea that Quebec should become a sovereign country from Canada. The second referendum in 1995 came very close to a victory of the camp in favour of Quebec's sovereignty. It won 49.5% of the vote, while the camp in favour of remaining in the federation won 50.5%. Since the beginning of the year 2000, the sovereignist option in Quebec has held an approval rating slightly below 40%. Although the sovereigntist movement seems to be in decline, claims-making in favour of more autonomy for Quebec, a more decentralized federation, and an asymmetric conception of the federation remain popular.

While the sovereignist movement has not succeeded in transforming the province of Quebec into an independent state, it may be argued that this movement nevertheless made it a nation. Before the sixties, citizens of the province would mostly refer to themselves as French Canadians, whereas today they mainly consider themselves as Quebecers, with French Canadians being the French-speaking Canadians living in the other provinces of Canada.

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6.6: Nationalism in Time and Space

History of Nationalist Movements

Although it is sometimes argued that the modern nation-state system took root in the Treaty of Westphalia in 1648, it was not until the 20th century that formal empires vanished from global politics. Accordingly, since the French Revolution, many national liberation movements have sought to build a state by seceding from a formal empire and later form an already constituted nation-state.

Revolutionary Nationalism

The development of the first revolutionary form of nationalism is associated with the French Revolution and the wave of social movements associated with the *Déclaration des droits de l'homme*, the overthrow of absolutist regimes in Europe, and the secession of states from the metropolis of a European empire in the New World, such as the United States and Saint-Domingue (present-day Haiti). Nationalism therefore emerged in a world of agrarian empires, and during this phase it was closely associated with a movement of democratization and abolition of the absolutist and patrimonial state.

A second important wave of nationalist movements is associated with the period of intense revolutionary turmoil known as the Spring of the People in 1848. During this period, many liberal and socialist movements demanded constitutional reforms against the structure of power of absolutist regimes and empires. Many sought to secede from an existing empire. Many of these social forces were crushed by conservative policy. The period between 1860 and 1900 is often associated with a wave of nationalist revolutions from above. The period was strongly influenced by a new conception of the nation often rooted in the romanticism and organicism of the "people". This period saw the consolidation and unification of the state of Germany under the leadership of Prussia and the formation of the state of Italy. In both cases, a larger territorial and political unit emerged from the unification of smaller principalities. The period between 1917 and 1923 saw the fragmentation of old agrarian empires: the Habsburg Empire and the Ottoman Empire. According to historian Eric Hobsbawm, this period saw a logic of balkanisation, that is, a pure application of a Gellnerian logic of political morselling according to ethnocultural boundaries.

Self-Determination and the League of Nations

Following the First World War, two important world leaders, Vladimir Lenin and Woodrow Wilson, recognized the right of nations to self-determination. This was also the context that led to the institutionalization of an international organization known as the League of Nations. Although Lenin and Wilson agreed in principle with the norm of the right of nations to self-determination, global politics between the two world wars remained far from a world of nation-states. Many European powers maintained protectorates and colonies until the 1960s. Canada, for instance, did not have a foreign policy completely independent from the British Empire before the 1930s. During the Second World War, many colonies fought the war on the side of their European metropolis. Some scholars argue that the experience of war was an important stimulus for the channeling of anti-imperial sentiment and national liberation movements during the middle of the twentieth century (Eckert, 2016). The 1960s was an important decade for national liberation struggles in the Global South but also for nationalist movements in North America, in Quebec and Acadia for instance. This was a global context in which the United Kingdom and France were both losing global influence, while the Cold War divisions between two major spheres of influence, American and Soviet, were settling in.

The collapse of the Soviet Union and the end of the Cold War between 1989 and 1991 led to another wave of state formation in Eastern Europe. Although this wave was welcomed with optimism among liberal scholars who celebrated the global hegemony of the rule of law, it did not take long for ethno-national conflicts to reappear in former Yugoslavia.

It took a long time for the state to become the dominant political unit of global politics. Yet, even today, despite the collapse of formal empires, there are still many political conflicts along national lines. Some nationalist movements in multinational states are seeking a greater decentralisation of power or a greater recognition of their national autonomy. In other instances, state-seeking nationalists are asking for political secession from a larger nation-state from which they feel politically alienated.

National Populists

Since 2016, we have been seeing a new wave of nationalist movements: national populists (Eatwell, 2018). They are surging in a different world characterized by Brexit, the election of Donald Trump in the United States and the election of Rodrigo Duterte in the Philippines. These movements are often labelled as national populist and are associated with a current period of right-wing authoritarianism. An important feature of these movements is that they are not interested in the creation of a new state. They mobilize their followers along two axes. Along a vertical axis, they mobilize the so-called "people" against the so-called "elites"; while along a horizontal axis they mobilize the "nation" against foreigners or an internal "threat". National populist mobilizations therefore seek to create new hierarchies of belonging, where the so-called people of the heartland are presented as more legitimate than others. In many places where national populists gain traction, they can rely on an alliance with ethno-religious political forces; it could be the evangelical movements behind Trump and Bolsonaro, the Catholics supporting the Polish or French far right, the Hindus supporting Modi, or the Christian Orthodox behind Putin.

Nationalism and Religion

The Swedish political scientist Catarina Kinnvall further underlines the analogy between nationalism and religion. Nowadays, she suggests, nationalism and religion "are more likely than other identity constructions to provide answers to those in need, [they] supply particularly powerful stories and beliefs because of their ability to convey a picture of security, stability, and simple answers. They do this by being portrayed as resting on solid ground, as being true, thus creating a sense that the world really is what it appears to be" (Kinnvall, 2004, p. 742). They are, in other words, the most convincing "identity-signifier" in modern societies (ibid.). Not only can the nation be seen through such theories as the holder of the modern political membership giving access to diverse rights and opportunities, it can also be understood as a factor of ontological security as much as religion (ibid., p. 746). By providing an "abstract identity [...] one identity that answers the need for securitized subjectivity [and] its very long history, this monolithic entity [of the nation] becomes a stabilizing anchor in an otherwise chaotic and changing world, linking the past and the present to future action" (ibid., pp. 758-759).

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6.7: Conclusion

Concluding Remarks

Nationalism has implied for more than two centuries that the world is, or should be, divided into nations. The success of this modern ideology is undeniable, as it has spread to every continent. It has been mobilized by actors that hold diverse, perhaps antagonistic, positions throughout the political spectrum. It may be the malleability of this ideology that has allowed it to triumph throughout the world. Although it has been announced as a passing phase that is in decline many times, in moments of crisis nationalism always seems to resonate anew, as if the remains of an ambiguous past were indicative of a better future.

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- **Banal Nationalism**: The endemic condition and ideological habits—such as daily routines, rituals, and symbols—that allow established nations to be reproduced through mechanisms that often go unnoticed.
- **Civic Nationalism**: A form of nationalism, rooted in the Enlightenment, that fosters horizontal solidarity among citizens who are viewed as equal before the law and identify with the state's constitutional legacy.
- **Cultural Nationalism**: A movement led by "ethnic revivalists" (such as artists and scholars) who use the past to regenerate a community's morals and formulate its cultural ideals.
- **Diaspora Nationalism**: The nationalist beliefs and practices of individuals living outside their perceived homeland who remain attached to that "imagined homeland," even if they have never lived there.
- **Ethnic Core**: The unique combination of unifying myths, symbols, and memories from pre-modern ethnicities that distinguishes a nation from the interchangeable administrative components of a state.
- **Ethnic Nationalism**: Also known as organic or cultural nationalism, this type focuses on a member's identification with a specific language, shared cultural traditions, or ethnoreligious symbols.
- **Ethnosymbolism**: An academic school of thought that, while acknowledging nations are modern, emphasizes their pre-modern ethnic origins and the role of shared memories in their formation.
- **Homeland Nationalism**: A transborder mobilization used by a state toward ethnic minorities in neighboring countries who are considered to belong to the homeland's dominant ethnic group.
- **Homogenizing Nationalism**: A state-led form of nationalism that serves as the principal vector of integration into a state's political culture through its established institutions.
- **Imagined Communities**: A concept describing nations as groups where members will never meet most of their compatriots but can imagine their shared existence through unified languages and daily routines.
- **Modernism**: A theoretical perspective in nationalism studies asserting that nations are not eternal but are products of modernity, specifically industrialization and standardized mass education.
- **National Populism**: A right-wing ideology that galvanizes "the people" against "elites" (horizontally) and "nation members" against "foreigners" or internal threats (vertically).
- **Nationalism**: A political principle asserting that political and cultural boundaries should be congruent, viewing the nation as a concrete historical entity and a primary political force.
- **Nationalist Movement**: Collective action specifically designed to render the boundaries of a nation congruent with its governance unit.
- **Nation-State**: A modern political entity that seeks to merge political and cultural identities, acting as an agency that represents and speaks for "one people".
- **Ontological Security**: A sense of stability and "simple answers" provided by national identity, which acts as a stabilizing anchor for individuals in a changing or chaotic world.
- **Political Nationalism**: A movement aimed at erecting a rational community of equal citizens unified by shared laws, often utilizing the work of cultural nationalists to legitimize the state.
- **Print Capitalism**: The convergence of capitalism and print technology that created unified fields of communication, allowing speakers of various dialects to comprehend one another through a shared printed language.
- **State-Seeking Nationalism**: Nationalism mobilized by a group that desires to build its own sovereign state or secede from a state that does not recognize its cultural specificity.
- **Unwaved Flag**: A national symbol used passively (such as a flag on a public building) that goes unnoticed but unconsciously reminds individuals of their national belonging.
- **Waved Flag**: The conscious and active use of national symbols—including signs, lexicons, or references—to assert a sense of belonging, often during holidays or sports competitions.

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6.10: Discussion Questions

1. Modernist theorists like Gellner and Anderson argue that nations are "unintended" products of industrialization and "print capitalism". However, ethnosymbolists like Smith argue that nations require a pre-existing "ethnic core" of myths and memories to be successful. In your opinion, can a state successfully "invent" a national identity from scratch, or must it always be rooted in a "summoning of an eternal past"?

2. Michael Billig suggests that nationalism is an "endemic condition" maintained through "unwaved flags" and daily routines, such as weather forecasts that geographically define the nation. How do these subtle, everyday reminders shape our sense of belonging more effectively than the "waved flags" of national holidays or sports competitions?

3. While civic nationalism is often framed as inclusive and democratic, the sources note that even "civic" institutions (like official languages or legal traditions) are rarely culturally neutral. To what extent is "civic nationalism" actually a form of "homogenizing nationalism" that masks the dominance of a specific cultural group?

4. Current national populist movements focus on a horizontal axis (the "people" vs. "elites") and a vertical axis (the "nation" vs. "foreigners"). Why might this specific form of nationalism provide a sense of "ontological security" and "simple answers" in today's globalized and "chaotic" world?

5. A nationalist movement is defined as an effort to make political and cultural boundaries congruent. The case of Quebec shows that the sovereignist movement failed to create an independent state but succeeded in transforming the population's collective identity from "French Canadians" to "Quebecers". If a movement fails to achieve political independence but succeeds in creating a distinct nation, can it still be considered a "successful" nationalist movement?

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7: POPULISM

Introduction

Populism has become a political buzzword in the twenty-first century, and yet it remains an essentially contested concept. An early theorist of populism, Ernesto Laclau, recognized that “few [terms] have been defined with less precision. We know intuitively to what we are referring when we call a movement or an ideology populist, but we have the greatest difficulty in translating the intuition into concepts” (Laclau, 1977, p. 143). Populism has been used to describe distinctive social movements, political parties, leaders as well as a tradition of political thought. Unlike other ideologies, however, it is rare that leaders or parties self-identify as populists because populism has been imbued with negative connotations and often used as a derogatory term.

The vagaries of populism should not prevent theorists from trying to develop a suitable definition of it. One such definition has been provided by Cas Mudde and C.R. Kaltwasser (2017, p. 6), who define populism as “a ‘thin-centered’ ideology that considers society to be ultimately separated into two homogeneous and antagonistic groups, ‘the pure people’ versus ‘the corrupt elite,’ and which argues that politics should be an expression of the *volonté générale* (general will) of the people.” This definition reflects the populist assumption that there are fundamentally only two types of people in society: the ‘real’ or ‘pure’ people and a corrupt elite who are not merely out of touch, but also actively working against the interests of the ‘real people’. As such, the ‘real people’ are right to feel hostility and distrust towards elites, and this creates an antagonistic relationship between the two groups. A distinctive feature of populism is its angry style of politics – indeed, some have referred to populism as less an ideology and more a style of politics.

This text examines populism, defining it as a "thin-centered" ideology that simplifies society into a conflict between virtuous citizens and dishonest elites. The text identifies three foundational pillars—the pure people, the corrupt elite, and the general will—which allow the movement to attach itself to broader frameworks like socialism or nationalism. While the sources acknowledge that populism can democratize rigid systems by giving voice to the ignored, they also warn of its authoritarian tendencies and its rejection of liberal pluralism. Regional analyses trace the history of this phenomenon from nineteenth-century agrarian movements to contemporary leaders in Latin America, Europe, and North America. Ultimately, the material suggests that populism thrives on emotional politics and flourishes during periods of economic uncertainty or cultural transition.

Learning Objectives

- Define and explain the three core concepts of populism—the ‘pure people’, the ‘corrupt elite’, and the ‘general will’—and describe how these concepts contribute to the ideology's characteristic "anti-politics" themes.
- Differentiate between left-wing and right-wing populism, specifically identifying how they attach to different "host ideologies" (such as socialism or nationalism) and how they vary in their stances on economic globalization, immigration, and social welfare.
- Analyze the complex relationship between populism and democracy, assessing how populist movements can act as both a corrective force for neglected groups and a corrosive threat to the institutions of liberal and representative democracy.
- Compare regional manifestations of populism across different contexts, such as the long-standing tradition of caudillismo in Latin America, the rise of nativist parties in Europe, and the regionalized mobilization typical of North American populism.
- Evaluate "demand-side" and "supply-side" theories for the rise of populism, including economic factors like the "losers of globalization," cultural backlashes against multiculturalism, and the perceived centralization of mainstream political parties.

7.1: Core Concepts and Themes
7.2: Variants of Populism
7.3: History of Populism
7.4: Populism in the Contemporary Era
7.5: Latin American Populism

7.6: European Populism
7.7: North American Populism
7.8: Asian and Australasian Populism
7.9: The Future of Populism
7.10: Glossary
7.11: References
7.12: Discussion Questions

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7.1: Core Concepts and Themes

Core Concepts

There are three core concepts that comprise populism as an ideology: the 'pure people', the 'corrupt elite', and the 'general will'. The term populism itself is derived from the Latin word populus (meaning 'the people'). Thus, at the core of populism is the notion of popular sovereignty in which legitimate rule can only emanate directly from the people. However, who exactly are 'the pure people' is often ill-defined because it is a construction rather than an empirical fact. The people have variously been associated with specific groups in society, such as 'the nation' (as in 'the people of Brazil', often with ethnic undertones) or even just a silent majority. Nonetheless, populist politicians try to make a direct appeal to 'the people', claiming to represent their true hopes and fears as the vox populi (voice of the people). Likewise, populists will identify or construct a 'corrupt elite' who are enemies of the people. All populists despise political elites, who they refer to as the 'political establishment' or the 'political class'. Yet populists vary on which other groups are amongst this corrupt elite, which might include economic elites (the wealthy, the 'one percent'), cultural elites (such as academics or scientists), or media elites ('fake news' or the 'chattering classes'). Whatever groups get targeted as the corrupt elites, populists will argue that they not only ignore 'the people' but also serve only their own interests, which do not align with those of 'real' or 'pure' people. Finally, populism makes political claims about the 'general will', otherwise known as the popular will or the will of the people. This general will (and popular sovereignty) are claimed to be the ultimate – and only – sources of legitimate authority. Notably, this general will is not one that is constructed or revealed vis-à-vis debates within the public sphere but rather one that is immediately known by populist leaders and often based on a vague notion of 'common sense'. The notion of a general will is used by populist leaders to aggregate demands and identify a common enemy. Furthermore, populists claim it cannot be wrong. This can lead to the dark side of populism: because 'the people' are homogeneous and their will is infallible, there are justifications for a tyranny of the majority as well as authoritarian tendencies amongst its leadership. At the core of the populist ideology is a strategic deployment of three concepts: the 'pure people', the 'corrupt elite', and the 'general will'.

Major Themes

Beyond the core concepts, one can recognize consistent if not ubiquitous themes that emerge from populist ideology. An overarching theme is anti-politics, which can manifest in a number of ways. The most obvious way is anger with the political establishment. Populism is an expression of disenchantment with conventional politics, and it facilitates the emergence of anti-establishment political leaders and movements. Populist leaders try to convey an image of being political outsiders who are untainted by conventional power politics. Second, populists are anti-politics inasmuch they distrust and oppose many of the 'intermediary institutions' of representative democracy. Representative democracy can get in the way of more direct expressions of the general will of the people. Only those institutions that directly involve citizen expression (such as elections, referenda, plebiscites) are legitimate. Other institutions, such as conventional political parties, bureaucracy, or the judiciary, are illegitimate and interfere with political expression of the popular will. Third, populism is an expression of emotional (often angry) politics. Populists are seldom interested in engaging with reasonable discourse or rational policy choices, and they tend to ignore or even deliberately flaunt the rules and norms of conventional politics. Populists deliberately play on the emotions of citizens – especially feelings of fear, anger, and uncertainty. Historian Richard Hofstadter (1955) suggested that populism was little more than a 'paranoid style of politics', while other theorists have commented on how the 'performance' of crisis enables populism to flourish (Moffitt, 2015; Stavrakakis et al., 2018). Finally, populism is anti-politics in that it is a moral category rather than an intersectional political identity like class, gender, ethnicity, religion, and so on. Populists adopt a Manichean worldview (i.e., good versus evil, Us versus Them, and the illusion of a unified whole), and populist leaders make claims about having exclusive moral representation of the 'pure people' (Müller, 2016). These themes contribute to an understanding that populism is fundamentally anti-politics.

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7.2: Variants of Populism

Thin-Centered Ideology

Populism is a 'thin-centered' ideology because it does not have strong concepts of its own. It merely purports to reflect the will of the people – whoever those people are and whatever their will might be. 'Full' or 'thick' ideologies, such as liberalism, or socialism for example, have clear, consistent, and coherent claims about the way society is and the way it should be. Populism does not. It merely claims that 'the people' should be the driving force in politics – without prior claims about what kind of society 'the people' might want. Thus, populism is malleable and must attach itself to other ideologies. It is the combination of populism and a thicker 'host ideology' that can generate specific (and localized) definitions of 'the pure people' and 'the corrupt elite'.

Left-Wing Populism

Two 'host ideologies' are natural bedfellows for populism and indeed produce the two distinctive types of populism we see in the world today: left-wing populism and right-wing populism. Left-wing populism is essentially a combination of populism and socialism. Historically, left-wing populism was prevalent mainly in Latin America, yet it has also surfaced recently in Europe and North America as a backlash against the politics of austerity. Austerity refers to government-mandated reductions in welfare state spending, and austerity measures were widely adopted by Western governments during the economic recession that followed the global financial crisis of 2007–2009. A well-known example of a left-wing populist is Bernie Sanders, a self-declared socialist who narrowly missed out on leadership of the US Democratic Party in 2015. In Europe, radical left populist parties emerged in countries hit hardest by economic crisis and recession, countries that were also subject to austere 'bailout' rules imposed by international organizations like the European Union and the International Monetary Fund. In Greece, Syriza (the Coalition of the Radical Left) became the largest party in the Greek Parliament during 2015 elections, and its chairman Alexis Tsipras became Prime Minister of Greece. That same year, Podemos (meaning: 'We can') became the second largest party in terms of parliamentary seat share in Spanish elections. However, left-wing populism is less common (in practice) than right-wing populism, which we will turn to next.

Right-Wing Populism

Right-wing populism is essentially a combination of populism and nationalism. It invokes the 'pure people' as a unified and homogenous national identity and claims that this identity (and perhaps also the nation itself) is under threat. Charles Maier (1994) coined the term 'territorial populism' to describe a xenophobic national identity that excludes others (usually immigrant groups) while also mobilizing negative and reactionary emotions towards powerful external agents (such as the European Union, China, or multinational corporations). It is in this rejection of external (and often capitalist) agents that one can see some overlap between left-wing and right-wing populism. In the twenty-first century, right-wing populism has effectively become a counter-globalization ideology that acts as a bulwark against cultural and economic globalization. Like left-wing populists, contemporary right-wing populists are against free trade and seek to protect and promote the national (or sometimes local) economy. Unlike left-wing populism, right-wing populism is also characterized by cultural conservativism, which is staunchly anti-immigrant. Right-wing populists galvanize citizens by referencing a constant threat to national identity, a threat that emanates from both inside and outside the nation-state – inside from corrupt elites and minority viewpoints and outside from immigrants who belong to (and retain allegiance to) other nation-states. For right-wing populists, borders become symbolic boundary markers, and the constant threats to identity and security demand a permanent state of emergency that mundane 'establishment' politics has failed to recognize or act on. For many right-wing populists, the message is: 'unless you fight, you will lose your nation'. Due to this messaging, critics of right-wing populism suggest that this ideology is essentially fascist in nature and less related to more benign forms of nationalism. Historically, there might be some veracity to this claim. Frederico Finchelstein (2017) observed that modern (right-wing) populism was born out of early twentieth-century fascism. When fascist dictators were defeated in World War II, populism emerged as a postwar reformulation of fascism. However, populism differs from fascism in a number of crucial aspects. For one, they differ in terms of their commitments to democracy. Fascists reject democracy in all its forms and see violent struggle as the most appropriate means to getting and keeping power. Populists play the democratic game and typically cede power after losing elections. They also differ in their understanding of legitimate authority. Fascists exalt a charismatic leader – an elite by definition, albeit an incorruptible one – as well as prescribe a totalitarian dictatorship as the ultimate goal. Right-wing populists exalt the general will of the people – even if it is embodied by a charismatic leader – and prescribe to an authoritarian form of democracy. There is undeniable overlap between fascism and right-wing populism, especially in their tendencies towards

authoritarianism and their understanding of a single infallible source of political legitimacy (yet differing on what that source is: for fascists it is the will of the leader, while for populists it is the will of the people). Beyond authoritarian tendencies, right-wing populism and fascism explicitly relate to a third ideology: nationalism, with fascists romanticizing a symbolic hyper-nationalism, and populists merely treating the nation as an embodiment of the 'pure people'.

Rejection of Pluralism and Liberalism

There are other ideologies that are complete anathema to populism and that populists of all stripes reject. One of these is pluralism, which for right-wing populists also translates into a rejection of multiculturalism. Pluralism refers to a belief in or commitment to diversity, be it political diversity (such as strong competition between political parties) or cultural diversity (the belief that a variety of cultural beliefs is healthy and desirable). Populists have a vision of society being uniform, which often manifests in a unique, singular, and exclusive national identity. Although populists reject pluralism and cultural diversity, they also reject totalitarian regimes, meaning that populists will allow limited space for contestation in the public sphere (De la Torre, 2016; Müller, 2016). The other ideology that populists reject is liberalism, so much so that populism might be deemed anti-liberal. If liberalism is about the protection of individual rights and the separation of powers, then populism is fundamentally against these notions. The protection of visible minorities or minority political opinions is antithetical to policies that should reflect only the will of the majority. Separating branches of government so that the executive branch is constrained from unilaterally executing the general will is also antithetical to populism. According to populists, the executive branch (i.e., the populist leader) should be able to govern without interference from the judiciary because the populist leader is a legitimate representative of the people (and the people cannot be wrong), while a supreme court is unelected and out of touch with regular people, even when their rulings protect the rights of individuals. As we will see in the next section, populism's rejection of pluralism and liberalism creates a complex relationship between populism and democracy. In effect, populism advocates for an anti-liberal and intolerant form of democracy.

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7.3: History of Populism

Democracy

A minimal definition of democracy is some combination of popular sovereignty and majority rule. Beyond this, democracy can take many shapes. Direct democracy, of the type seen where referenda or plebiscites allow citizens to have a direct influence over policy or decision making, is strongly endorsed by populism. Adversely, populists take issue with liberal and representative democracy, which is when citizens elect representatives to make decisions, and those decision makers are constrained by the principles and political institutions of liberalism from abrogating the rights of individual citizens. As such, populism is fundamentally democratic yet also at odds with liberal democracy. Juan Francisco Fuentes (2020) observes that populism oscillates between 'hyper-democratism' and 'anti-democratism', with the former being a kind of nostalgia for direct democracy and the latter being the rejection of any kind of political mediation between the people and their leader.

Authoritarianism

Authoritarianism is a belief in or practice of government 'from above' without consent from the people. Populism's relationship to democracy can be partly understood in terms of the process of democratization over time. Populism can be a democratizing force within authoritarian regimes, giving voice to the masses and inspiring regime change. However, we must recognize that populism as an ideological phenomenon is predominantly found within – and challenging to – representative democracies. Dictators sometimes appeal to the masses to retain power in a more frictionless way, yet they do not need popular support to get or keep power. Populists must appeal to 'the people' in a representative democracy because populism remains but one ideological choice amongst many. Therefore, the main ideological competitor to populism is liberalism. It was liberalism that was the progenitor of modern (representative) democracy going back to the American and French Revolutions in the eighteenth century. Early proto-populist sentiments might have involved agitation for electoral democracy, yet populists themselves have certainly tried to negatively impact liberal democracy (Rosanvallon, 2008). Populism amplifies political participation over the short term yet minimizes it over the long term because once populism is consolidated, liberal and pluralist elements are the first to go, with democratic representation quickly eroded thereafter. Indeed, populism might necessarily be a transitory ideology in many contexts, because either it fails or it transcends itself into something bigger (i.e., a 'thicker' ideology). Populism could be properly understood as a response to other democratic ideologies after a democratic transition has moved into a consolidation phase.

Populism and Democracy/Authoritarianism

Populism has thus been characterized as either a corrective to, or else a 'perverse inversion' of, liberal democracy (Rosanvallon, 2008). Populism can be corrective of representative democracy in that it can: mobilize and give voice to societal groups that feel ignored by political elites, improve the responsiveness of the political system, re-politicize issues that elites have excluded from the political agenda, and strategically promote institutions that presumably construct the 'general will' of the people (referenda, plebiscites, etc.). Yet populism also has significant negative effects on democracy as well. It often results in an intense moralization of politics, whereby reaching agreements between disparate groups becomes very difficult. In lieu of agreement and compromise, majority rule is used to suppress minority opinion and circumvent minority rights. The will of the people – often demonstrable by the will of a majority in a plebiscite or election – becomes authoritative and infallible. Populism is democratic because it abides the wishes of 'the people' yet authoritarian because not all citizens count as 'the people' (and those who do not have no political legitimacy whatsoever). In effect, populism advocates for an authoritarian form of democracy, and it fundamentally rejects liberal and representative democracy.

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7.4: Populism in the Contemporary Era

Localized and Deeply Contextual

In practice, populism is localized and deeply contextual. Although we can identify abstract concepts that connect populisms around the world and throughout history, actual populists try to represent the values and interests of 'the people' in a specific place and time. For example, the earliest populist movements emerged in the late nineteenth century, and they all had a distinctively rural flavour. Louis Napoleon was the first elected president of France in 1848, and he immediately catered to the concerns of smallholding peasantry in the French countryside as well as implemented a modest kind of plebiscitary democracy. By 1852, he had dispensed with representative democracy altogether by declaring himself Emperor Napoleon III, which ushered in a period of populist politics in France known as 'Bonapartism'. In late nineteenth-century Russia, a small group of urban elites tried to mobilize and politicize the rural peasantry. This Russian populist movement (called 'narodnichestvo') was an abject failure. Finally, the actual term 'populism' was born in the United States during the 1890s following the creation of the People's Party in the American Midwest in 1891. This political party championed agrarian democracy and rejected the gold standard, financial power, railroad companies, and the political establishment. The People's Party ran a candidate in the presidential election of 1892 (James B. Weaver) who obtained 8.5% of the national vote share, yet it fizzled out when many of its supporters backed the Democratic Party candidate in the 1896 election. In hindsight, the appeal of populism to nineteenth-century farmers in very different parts of the world is quite logical. Representative democracies were either very new (France), not yet formed (Russia), or else dominated by urban elites (USA). So, farmers in all these places might have had reason to feel neglected by the political establishment. These populisms conform to the patterns of populist democratization discussed above (i.e., early populisms being emancipatory projects), yet each movement was distinct in how it characterized 'the pure people' and 'the corrupt elite'.

Regional Patterns

Populism seems to follow broad regional patterns as well. In part, this is due to variations in political opportunity structures that different types of representative democracies present to populists. In presidential democracies (Latin America, the USA, the Philippines), populism typically manifests through personalist leaders who try to appeal to the 'pure people' directly. Parliamentary democracies (all of Europe) will tend to incentivize new parties to emerge – or traditional parties to transform into populists – even when a strong leader might be part of this process. Thus, we can begin to recognize distinct patterns of populism on different continents. The section below discusses these patterns, beginning with the strongest (and in some respects, oldest) populisms in Latin America, followed by Europe, North America, and finally the newest arena for populism: Asia. It should be unsurprising that populism has emerged only recently in regions with the youngest democracies because populism is fundamentally a response to representative democracy. As such, Africa is not discussed here because populism has not yet become a meaningful force. One could argue that there were populist elements to the Arab Spring uprisings that began in 2011. One could argue that Nelson Mandela (president of South Africa from 1994–1999) was a populist and that his successors Thabo Mbeki and Jacob Zuma tried to govern as populists, yet the core aspects of populism (a 'pure people' versus a 'corrupt elite') were not entirely central to these political movements. Nonetheless, populism is much more widespread than realized by most North Americans – who have been overly focused on Trumpism, a recent phenomenon. Yet it is necessary to exclude many populisms in order to focus on only the most seminal ones.

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7.5: Latin American Populism

Populism in Latin America

Central and South America are where populism has prevailed the longest, perhaps because caudillo political culture tends to venerate strong leaders who purport to rule 'on behalf of the people'. Just about every country in Latin America has had a prominent populist movement, and most have also had a populist regime in power at one time or another.

Caudillos

Caudillos were military strongmen that dominated Latin American politics during the period between early 19th century independence movements and widespread democratic consolidation in the late 20th century. The political culture of caudillismo continues in Latin America, but now with a populist twist. Whereas traditional caudillos were elites by definition (i.e., they engaged in patron-clientelist relations with political and economic elites), caudillismo culture has encouraged the masses to look to charismatic and personalistic leaders to defend their interests. Early Latin American proto-populists might have rebelled against caudillos to try to democratize their societies, but, ultimately, populism in consolidated democracies actually encourages caudillismo.

Modern Populist Regimes

Indeed, the first modern populist regime was in Argentina. This movement, dubbed Perónism, ran the gamut of populisms (from right to left) within a single fractious political party over the course of three decades. General Juan Domingo Perón served as a minister in the military dictatorship that ruled Argentina from 1943 until 1946 and then won the presidential election in 1946. Initially, Perón made appeals to the marginalized and impoverished (what he called the 'shirtless ones') and fed off popular resentment against 'Yankee imperialism'. Yet, he also flirted with fascist elements in Argentinian society, including the harbouring of Nazi war criminals. Perón served as president until he was ousted by a military coup in 1955, yet his ideologically fragmented political party persisted (often underground) even after he was forced into exile. He returned to Argentina for a final term as president from 1973 until his death in 1974. Argentina is a microcosm of just how malleable populism has been in Latin America and how readily populists can win power. There have been extreme right-wing populists in power, such as Perón in Argentina and José María Velasco Ibarra, president of Ecuador five times between the 1930s and the 1970s. There have been right-wing neoliberal populists in power, such as Alberto Fujimori, president of Peru from 1990 until 2000, and Carlos Menem, president of Argentina from 1989 until 1999. And there have been left-wing populists in power, such as Hugo Chávez, who won the Venezuelan presidential election in 1999 and then manipulated the constitution to retain power until his death in 2013 (he also handpicked his successor, Nicolás Maduro, who still retains power in Venezuela). Another is Evo Morales, a leftist ethno-populist who was president of Bolivia from 2006 until 2019 and whose 'Movement toward Socialism' strongly advocated for indigenous rights and equality. Populism of every type has seen its most verdant expression in Latin America, and a number of durable political regimes have been constructed using populist ideologies.

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7.6: European Populism

Populism in Europe

Until the twenty-first century, populism was a marginal ideology in Europe. This ideology was subsumed into communist or fascist movements during the 1920s and 1930s, and it failed to re-ignite after World War II. The only notable exception was Poujadism in France, where Pierre Poujade established a nascent populist party to contest the 1956 French national election, but he failed and Poujadism faded away. A young Jean-Marie Le Pen was active in Poujade's party, and he would go on to form his own political party, the National Front, which has since become synonymous with a European populism that is largely of the right-wing, nativist variety. This party (renamed National Rally) is now led by his daughter, Marine Le Pen. She was runner-up in the 2017 French presidential election, which might have been the highwater mark for right-wing populism in Europe, a wave that began in the 1990s with the creation of xenophobic extreme-right parties in national political arenas across the continent. Many of these right-wing parties were politically irrelevant until changing conditions provided them the opportunity to make broad populist appeals. Two major events (or 'crises') generated support for these formerly fringe parties: the 2008–2009 global recession and the 2015–2016 immigration 'crisis'. Populist parties and leaders capitalized on feelings of nativism by publicly rejecting both immigration and the European Union (EU). Nowhere were the results of this nativist populism starker than in the United Kingdom, where the United Kingdom Independence Party (UKIP) successfully campaigned to win a 2016 referendum that would have the UK leave the EU. UKIP and the Brexit referendum had all the hallmarks of right-wing populism: opposition to immigration and multiculturalism, opposition to the Brussels 'Eurocracy' as distant and illegitimate political elites, highly emotive (and seldom factual) campaigning, and the use of direct democracy – the referendum itself – as a fulsome and irrevocable expression of the general will (even though less than 52% of Britons actually supported Brexit). Populism thrives in conditions of fear and insecurity, and populists like Nigel Farage (head of UKIP) promised certainty, simplicity, and unity, with things like a clear and binding national identity.

21st Century Populism in Europe

Although right-wing populism has been predominant in twenty-first century Europe, left-wing populists have also found some electoral success, such as Syriza in Greece and Podemos in Spain. The country that seems to have seen it all is Italy, but then anyone familiar with Italian politics (the 'basket-case' of European politics) might not be surprised by this. The range of populisms in Italy rivals that of Argentina, but in a shorter span of time. Silvio Berlusconi was a neoliberal populist who served as Italy's prime minister three times (1994–5, 2001–6, and 2008–11) and used his personal resources as a media tycoon (and owner of AC Milan football club) to spread his populist appeal. In 2018, a short-lived Italian government was formed from a bizarre coalition of populists. The Five Star Movement (ostensibly an anarchist-populist party) took on as a junior partner the Northern League (a right-wing populist party that changed its name to just 'League' to broaden its appeal). Like Argentina, Italy might be the Western European country that has provided the greatest variety of populism and where populism has had significant impacts as a governing regime.

Finally, it is worth noting European cases where populism has had the most transformative effect, inasmuch liberal democracy (or even democracy itself) no longer functions. In Russia, Vladimir Putin was a relative unknown when he won the presidential election in 2000 with 53.4% of the popular vote. Since then, Putin has used a populist platform to subvert liberalism in Russia and then undermine representative democracy altogether. Russia is no longer a meaningful democracy. In Hungary and Poland, illiberal and right-wing populist parties are in government, where they run afoul of their obligations to the EU as well as actively suppress free media and public universities (Hungary) or politicize the judiciary (Poland). In Turkey, current president Recep Tayyip Erdoğan has altered the constitutional order to retain personal power as a populist. Erdoğan was not a populist when he became prime minister of Turkey in 2003, yet he succumbed to the allure of populism at a party congress in 2007, when he demanded of his critics: "We are the people. Who are you?" (Müller, 2016, p. 3). The advent of right-wing populism on the periphery of Western Europe will not inevitably lead to populists governing in places like France or Germany, yet with right-wing populists in every country in Europe, populism is waiting for suitable conditions to flourish.

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7.7: North American Populism

Populism in North America

The conditions for a flourishing of populism in the USA seemed to culminate in the year 2016. That year, Donald Trump, a right-wing populist, contested and won the US presidential election as the candidate put forth by the Republican Party. His Democratic Party opponent, Hillary Clinton, lost the election in part because she was painted as a corrupt member of the political establishment in Washington, with Trump using slogans like 'lock her up' and 'drain the swamp' to demonstrate that he was a political outsider who would govern in the interests of 'real Americans'. Things might have looked quite different had Bernie Sanders won the Democratic Party primaries and if he decided to persist with his left-wing populist rhetoric. We would have seen an American presidential election contested by the conventional establishment parties (the Republicans and the Democrats), yet also contested by two very different kinds of populists, both of whom claimed to govern for 'real Americans'. Although Trumpism is now its own established phenomenon (which will likely persist long after Trump's defeat in the 2020 presidential election), it is not the first time we have witnessed populism in American politics. Beyond the 'invention' of populism during the 1890s with the short-lived People's Party, there have been other American populists, usually but not always of the right-wing persuasion: Huey Long (governor of Louisiana from 1928–1932), George C. Wallace (governor of Alabama on three separate occasions), Senator Joseph McCarthy (whose persecution of alleged communists during the 1950s became known as 'McCarthyism'), and Texas billionaire Ross Perot (independent presidential candidate in the elections of 1992 and 1996). There have also been significant populist social movements on the left (The Occupy Wall Street Movement in 2011) and on the right (the Tea Party Movement that began in 2009). Yet until Trumpism, populism in North America has been characterized by weak organizational capacity and highly regionalized mobilization. Trump was perhaps the first American populist who was successful on a national scale.

Canada follows this pattern of weak organization yet strong regional mobilization amongst populist parties and movements. Indeed, some argue that Canada has been barren soil for populism because of its moderate political culture, lack of party polarization, and widespread norms of inclusivity and tolerance for immigrants (Adams, 2017). Yet, angry populist politics has emerged at the regional level. Preston Manning was a member of Parliament who founded the right-wing populist Reform Party in 1987, and his party had some electoral success in western Canada during the 1993 federal election before eventually merging into the federal Conservative Party in 2003. Right-wing populism has perhaps been strongest in Albertan provincial politics. The current premier of Alberta, Jason Kenney, has been called a populist, yet he has had to 'compete' with more marginal right-wing populists like the provincial Wildrose Independence Party and the federal Maverick Party – both of which agitate for the secession of Alberta from Canada. Frustration with 'politics-as-usual' is growing outside of Alberta as well. In 2018, Doug Ford was elected premier of Ontario, and François Legault was elected premier of Québec. Both ran populist electoral campaigns, yet they have not consistently governed as populists when in power. It would seem that provincial populism is becoming an avenue for voters to express frustration with federal politics without actually seeking a populist alternative in Ottawa. The only populist party that has been national in scope has been the People's Party of Canada created by former Conservative MP Maxime Bernier in 2018. Yet, his national populist message resonated weakly amongst Canadian voters, and his party failed to win any seats (including his own) in the 2019 federal election. Canada continues to follow the North American pattern of regional populism that surfaces occasionally when conditions permit but without a Trump-like figure that has been able to mobilize populism on a national scale.

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7.8: Asian and Australasian Populism

Populism in Asia

As populism is largely a response to the shortcomings of representative democracy, it should come as no surprise that the regions where democracy is least developed or least consolidated is also where populism has had only recent inroads. Still, populism has begun to appear in Asia as well. The oldest representative democracies in the region are Australia and New Zealand, and each saw the emergence of right-wing populist parties during the 1990s, with the New Zealand First Party and the One Nation Party in Australia. Both remain fringe parties with very weak electoral support. There have been somewhat populist leaders in South Korea (Roh Moo-hyun, President from 2003–2008), in Taiwan (Chen Shui-bian, President from 2000–2008) and Thailand (Thaksin Shinawatra, Prime Minister from 2001–2006 and his sister Yingluck, Prime Minister from 2011–2014). However, the most prominent populists in Asia have been Rodrigo Duterte, President of the Philippines since 2016 and a right-wing populist who puts much emphasis on 'law and order'; and Narendra Modi, Prime Minister of India since 2014, who emphasizes Hindu nationalism. It is perhaps Modi that causes the most concern amongst critics of populism, as he appears to be remaking Indian society according to his (Hindu nationalist) view of the 'pure people' and their general will.

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7.9: The Future of Populism

Theories of Populism

It is obvious that populism has flourished in the 21st century, leading political scientists to evaluate the conditions that can lead to populism in specific settings and contexts. Explanations for populism fall into two general categories: demand-side (when groups of citizens 'demand' populist alternatives) and supply-side (related to the 'supply' of populist parties and leaders in representative democracies). It is important to understand that these theories of populism need not be mutually exclusive – they might all operate simultaneously – yet theorists tend to look to one explanation as a predominant reason for populism on a case-by-case basis.

Demand-Side

Amongst demand-side explanations, Dani Rodrik (2018) suggests that populism appeals to the 'losers of globalization', the idea being that post-industrial capitalism and economic globalization have resulted in 'winners' and 'losers', and chief amongst the losers in affluent economies have been low-skilled workers. However, evidence from the 2016 US presidential election suggests that the relationship between economic outcomes and populist appeal is far from straightforward (Rothwell & Diego-Rosell, 2016). For example, the median household income for supporters of Hillary Clinton was about $61,000, while for Trump voters it was approximately $72,000 (Silver, 2016). In this case, it was perhaps not the actual socio-economic gap between the haves and have-nots that bred support for Trump but rather the perception that economic prospects were dimming. Despite their relative affluence, some Trump supporters perceived that America was in economic decline and were thus galvanized by his slogan to 'Make America Great Again'. Another significant demand-side explanation is the cultural backlash theory, which suggests that populist appeal is strong amongst citizens who perceive that they are no longer able to recognize their own national or local community due to immigration and multiculturalism (Norris & Inglehart, 2019). Again, these explanations need not be mutually exclusive, and the same groups of voters can often have overlapping perceptions about economic injustice or deterioration and cultural backlash.

Supply-Side

Supply-side theories about the appeal of populism have focused on party systems and party competition in national settings. A mainstream party centralization thesis suggests that the perceived ideological centralization of political parties can lead some voters to believe that there are no longer real choices in elections, thus making newer populist alternatives attractive (Kitschelt & McGann, 1995). Another supply-side theory pertains to issue salience, in which fringe political parties can capture the imagination of groups of voters by focussing inordinately on single issues, such as immigration or Euro-skepticism (Meguid, 2005). One can see these supply-side theories coming together with the decline of centre-left and social democratic parties in Europe. These parties have tended to suffer electorally when economic interests or identities (i.e., class politics) begin to compete with ethnic or communal identities (i.e., identity politics). National identity or immigration issues become problematic for the left because right-wing populist parties will remake themselves as more centrist and multidimensional in order to appeal to working-class voters (Berman, 2019). Sheri Berman and others remind us that it does little good to vilify populist voters as just losers or bigots because populism appeals to individuals that have very real grievances (which the left have not dealt with very well). The issue with populism, then, is not that it is a brief anomaly that will go away when populists fail to redress grievances with their oversimplified solutions to complex societal issues. The real problem is that populism often leads to less political participation over time, such that many grievances will not even be heard in the future.

Populism's Future

Populism is here to stay because it correlates to representative democracy: as more countries around the world transition to and consolidate as representative democracies, populism will continue to grow globally. However, populism is also an intensely local and contextual ideology, so it is difficult to conceive of populism as being some kind of virulent idea that spreads from one country to the next. At most, populist success in one region might embolden populist leaders and voters in others. Some argue, rather hopefully, that populism reached its highwater mark in 2016 with Brexit and the election of Trump. Indeed, Marine Le Pen's loss to centrist candidate Emmanuel Macron in the 2017 French presidential election was thought by some to usher in a 'post-populist' period later reinforced by Trump's loss in the 2020 US presidential election. Yet, it is too early to draw such conclusions.

Even if populist parties and leaders become less powerful or less electorally popular in the future, the effects of populism are still being felt. Right-wing populism has reflected (or perhaps spurred) increased feelings of nativism and anti-elitism in countries all around the world. This has now begun to influence conventional political parties and establishment leaders, as mainstream politicians read from the populist playbook to garner support amongst disgruntled voters. As political scientist Yascha Mounk observes, “the past two decades have represented not a populist moment but rather a populist turn – one that will exert significant influence on policy and public opinion for decades to come” (Mounk, 2014, p. 28).

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- **Anti-politics**: A recurring theme in populism characterized by anger toward the political establishment, a distrust of intermediary institutions like the judiciary, and a reliance on emotional, often "angry," political styles.
- **Austerity**: Government-mandated reductions in welfare state spending, which served as a catalyst for left-wing populist movements in Europe and North America following the 2007–2009 financial crisis.
- **Authoritarianism**: A belief in or the practice of government "from above" that functions without the consent of the people.
- **Bonapartism**: A period of populist politics in 19th-century France under Louis Napoleon (Napoleon III), who catered to the peasantry and implemented plebiscitary democracy before declaring himself Emperor.
- **Caudillos**: Military strongmen who dominated Latin American politics from the early 19th century until the late 20th century. This culture of "caudillismo" continues to influence Latin American populism through its veneration of strong, charismatic leaders.
- **Corrupt elite**: A group constructed by populists as the enemy of the people. This "establishment" is accused of ignoring the people's interests to serve their own and can include political, economic, cultural, or media figures.
- **Cultural backlash theory**: A "demand-side" explanation suggesting that populism appeals to citizens who feel they no longer recognize their community due to the perceived threats of immigration and multiculturalism.
- **Demand-side (theories)**: Explanations for the rise of populism that focus on the factors leading citizens to "demand" populist alternatives, such as economic grievances or cultural backlashes.
- **Fascism**: An ideology that rejects democracy entirely, exalts the will of a charismatic leader, and views violent struggle as a legitimate means to power. While linked to right-wing populism, it differs in its rejection of the "democratic game".
- **General will**: Also known as the popular will, it is the ultimate source of legitimate authority in populist thought. Populist leaders claim to know this will immediately, often based on "common sense," rather than through public debate.
- **Host ideology**: A "thick" or "full" ideology (such as socialism or nationalism) that populism attaches to because it lacks a coherent vision for society on its own.
- **Left-wing populism**: A combination of populism and socialism that typically focuses on economic issues and backlashes against austerity.
- **Liberal democracy**: A form of representative democracy where the power of the majority is constrained by principles that protect individual rights and the separation of powers.
- **Liberalism**: An ideology centered on the protection of individual rights and the separation of government powers, which populists often reject in favor of unchecked majority rule.
- **Manichean worldview**: A perspective that sees the world in binary terms of absolute good versus evil, often framed by populists as "Us versus Them".
- **Narodnichestvo**: An unsuccessful 19th-century Russian populist movement where urban elites attempted to mobilize the rural peasantry.
- **Nativism**: A xenophobic national identity that excludes "others," particularly immigrants, and is often a central component of right-wing populism.
- **Perónism**: A highly malleable Argentinian populist movement that spans the political spectrum from right to left, centered on the legacy of leader Juan Domingo Perón.
- **Pluralism**: A commitment to diversity in political and cultural beliefs, which is generally rejected by populists who view society as a uniform whole.
- **Popular sovereignty**: The concept that legitimate rule can only come directly from the people; it is a core tenet of populist ideology.
- **Populism**: A "thin-centered" ideology that views society as divided into two antagonistic groups—the "pure people" and the "corrupt elite"—and argues that politics should express the general will of the people.
- **Pure people**: A constructed and often ill-defined group that populist leaders claim to represent. They are framed as the only legitimate source of political authority.
- **Right-wing populism**: A combination of populism and nationalism that defines the "pure people" through a unified national identity and views immigration and globalization as existential threats.
- **Supply-side (theories)**: Explanations for populism focusing on the "supply" of populist parties and leaders, such as the centralization of mainstream parties or the strategic focus on single high-salience issues.
- **Thin-centered ideology**: An ideology that lacks a consistent or coherent set of claims about how society should be organized, requiring it to attach to other "host" ideologies to function.

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7.12: Discussion Questions

1. Populism is often described as either a "corrective" to or a "perverse inversion" of liberal democracy. In your view, do its benefits—such as giving voice to ignored groups and re-politicizing excluded issues—outweigh its negative effects, like the suppression of minority rights and the intense moralization of politics?
2. The source states that populism advocates for an "authoritarian form of democracy" while fundamentally rejecting "liberal and representative democracy". How can a movement be rooted in popular sovereignty and majority rule yet still be considered authoritarian and anti-liberal?
3. Because populism is a "thin-centered" ideology, it must attach to "host ideologies" like socialism or nationalism. How does this malleability explain why populist movements can look so different across different regions, such as left-wing movements in Latin America versus right-wing movements in Europe?
4. When analyzing "demand-side" theories for the rise of populism, which factor do you believe is a more potent driver: the economic grievances of the "losers of globalization" or the "cultural backlash" against immigration and multiculturalism?
5. Some argue that the losses of high-profile populist leaders in recent years suggest we are in a "post-populist" period. However, others argue we have entered a permanent "populist turn" that will influence policy for decades. Based on the source's analysis of global trends, which perspective is more convincing?

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8: MULTICULTURALISM

Introduction

Multiculturalism is a complex and multifaceted concept. In day-to-day conversation, multiculturalism is most often used to describe either a demographic phenomenon – the racial, linguistic and religious diversification of societies – or a particular set of beliefs – that modern societies are better if they are more diverse and heterogeneous. Although scholars sometimes use the word multiculturalism in these two ways, they also use it to describe both a specific set of moral and ethical guidelines for modern societies and governments (i.e., a public philosophy) and a type of public policy.

This chapter provides an introduction to the scholarly use of the word multiculturalism. It begins by exploring multiculturalism as a public philosophy, and, in so doing, it describes multiculturalism's two main intellectual traditions or what we might call multiculturalism's two schools of thought. As this chapter will demonstrate, these schools of thought converge on certain key points but also differ in important respects.

The chapter then discusses three different ways in which modern liberal democratic states have deployed multiculturalism as a public philosophy in the design and implementation of diversity-oriented public policies. The chapter's final section examines multiculturalism's near and longer-term prospects as both a public policy and a public philosophy. In brief, while it is clear that liberal democracies still need a diversity-oriented public philosophy, it is unclear whether multiculturalism will and should continue to fulfill this role.

This textbook chapter examines multiculturalism as both a public philosophy and a public policy within modern liberal democracies. It identifies two primary intellectual traditions: the Canadian school, which emphasizes the importance of recognizing minority societal cultures, and the Bristol school, which focuses on national identity and religious belonging. While some nations have adopted official multiculturalism to facilitate fair immigrant integration, the text notes that many others implement specific multiculturalism policies without a formal national mandate. The sources highlight that even historically resistant environments, such as the United States and the United Kingdom, have developed extensive frameworks for accommodating diversity. Finally, the material explores the challenges facing this model, contrasting it with alternatives like interculturalism and muscular liberalism.

Learning Objectives

- Distinguish between the various schools of thought within multiculturalism, specifically comparing the tenets of the Canadian School (focused on societal cultures and group-differentiated rights) and the Bristol School of Multiculturalism (emphasizing religious identity and intercultural dialogue).
- Differentiate between multiculturalism's multiple uses as a demographic phenomenon, a specific set of beliefs, a public philosophy (moral and ethical guidelines), and a type of public policy designed for implementation by governments.
- Evaluate the implementation of "Official Multiculturalism" and Multiculturalism Policies (MCPs) across various liberal democracies, analyzing why some states formally adopt national mandates while others implement policies even in environments that appear ideologically "inhospitable".
- Compare and contrast multiculturalism with its primary integrationist rivals, such as civic integration policies, muscular liberalism, and interculturalism, to understand how different models address immigrant integration and national identity.
- Critique the near and longer-term prospects of multiculturalism by assessing the impact of shifting ideological environments toward the political right and the limitations of current multicultural frameworks in addressing anti-Black and anti-Indigenous racism.

8.1: Main Schools of Thought

8.2: The Canadian School

8.3: The Bristol School

8.4: Multiculturalism's Variants

8.5: Official Multiculturalism
8.6: Multiculturalism Policies
8.7: Multiculturalism in Inhospitable Environments
8.8: Multiculturalism's Near and Longer-Term Prospects
8.9: Multiculturalism's Rivals
8.10: A Shift in the Ideological Environment
8.11: Conclusion- Multiculturalism's Limitations
8.12: Glossary
8.13: References
8.14: Discussion Questions

Attribution

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8.1: Main Schools of Thought

Canadian and Bristol Schools

The following pages describe the six main tenets of the long-standing Canadian school of thought on multiculturalism, named so for its two main contributors: Canadian philosophers Charles Taylor and Will Kymlicka. This section then concludes with a brief overview of an emerging school of thought based in the United Kingdom. This school of thought is largely associated with the works of scholars Tariq Modood, Nasar Meer, Varun Uberoi, and Bhikhu Parekh, all of whom are affiliated with the University of Bristol's Centre for the Study of Ethnicity and Citizenship. Geoffrey Brahm Levey (2018) describes these scholars' contributions to understanding multiculturalism as "the Bristol School of Multiculturalism" (or "BSM" for short) due to their shared institutional affiliation. As we shall see, the BSM is in part a response to Will Kymlicka's normative theory of "liberal egalitarian multiculturalism", and therefore some of its tenets differ from those of the Canadian school of thought on multiculturalism.

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8.2: The Canadian School

Meaning and Fulfillment

The Canadian school of thought's central tenet is that, as individuals, our quest for meaning and fulfillment in life does not and cannot take place in complete isolation from other human beings. In fact, according to Will Kymlicka, each and every one of us belongs to a distinct "societal culture". To begin with, Kymlicka defines a "culture" – in the now classic *Multicultural Citizenship* (1995) – as "an intergenerational community, more or less institutionally complete, occupying a given territory or homeland, sharing a distinct language and history" (p. 18). A "societal culture", therefore, is a type of "intergenerational community" that provides individuals with a set of values, a sense of the purpose in one's life as well as an understanding of what the good life constitutes. Along similar lines, Charles Taylor argues in the equally important Multiculturalism and the Politics of Recognition (1992) that human beings are not "monological" subjects; this means that our individual identity, while "inwardly generated" (p. 34) and disassociated from one's social position, is actually never fully realized in complete independence from other human beings. Rather, according to Taylor, humans are "dialogical" subjects. We define ourselves (i.e., understand our identity, who we are, our "authentic" self) through the use of a range of "rich human languages of expression" (p. 32) and in dialogue with other people.

The Good Life

Trying to understand what "the good life" constitutes is something that preoccupied Ancient Greek and Arab philosophers and it continues to be a key question for contemporary philosophers and political theorists. What binds most of these inquiries together is the shared understanding that mere existence is not enough and that human beings need fulfillment, satisfaction, and meaning to truly live. Scholars differ in their perspectives on the means to achieving fulfillment, satisfaction, and meaning and what a life beyond mere existence should actually look like. Consequently, there are competing visions of "the good life."

Multiculuralism

The Canadian school of thought's second tenet is that modern democratic states are "multicultural." This means that these states contain a variety of cultural groups – by which I mean groups with distinct societal cultures – within their territorial borders. Every multicultural state contains both a majority cultural group as well as one or several minority cultural groups within its territorial boundaries.

A majority cultural group – which can also be referred to as a "majority nation" – is one whose members' shared language, history, customs, religion, values, and/or conception of the good life is reflected in and embodied by the state's institutions, its ideals of citizenship and political participation, and its national symbols. In addition, the language of the majority group is most often also the language of commerce in the state.

Minority cultural groups emerge as the result of processes of voluntary immigration, the colonization of Indigenous peoples, and the forced incorporation of territorially concentrated nations (such as the Catalans, South Tyroleans, the Basque People, the Scottish, and the Québécois). Due to these processes, the languages, customs, religion, and values of minority cultural groups do not enjoy the same degree of institutionalization and public recognition as those of the majority nation; they may in fact not be institutionalized or recognized at all.

Most modern liberal democratic states consist of a majority nation as well as one or several "polyethnic" groups. The term "polyethnic" is used in studies of multiculturalism to describe minority communities that emerge as by-products of individual and familial immigration. Some countries, such as Italy, the United Kingdom and Spain, contain both polyethnic minorities as well as one or several territorially concentrated (non-Indigenous) political communities that once had some degree of political autonomy but were then forcibly incorporated into a state. These communities are known as "minority nations". There are only a handful of modern liberal democratic states that encompass polyethnic minorities, Indigenous peoples as well as a minority nation within its territorial boundaries. Canada is one of these states.

Indigenous Peoples

The Canadian school of thought's third tenet is that Indigenous peoples, minority nations, and polyethnic groups face challenges that the majority nation does not. For instance, the processes of colonization and forced incorporation threaten the continuity of the societal cultures of Indigenous peoples and minority nations because it is usually the majority nation's societal culture that is institutionalized and embodied in national symbols and the official language. Additionally, the extent to which the majority nation's customs, language and values naturally pervade private and public spheres means that polyethnic minorities must, to some degree or another, abandon their own societal culture and adopt and internalize the majority nation's societal culture if they are to have any chance of fully participating in these spheres.

Charles Taylor brings to light another critical challenge that minority cultures face. One of the key implications of Taylor's understanding of dialogical human existence is that, since our identity is defined by our dialogue with those around us, our understanding of who we are is also in part contingent on how others recognize us. If we extend the understanding of dialogical human existence to examine the relationship between majority and minority cultural groups, this means that a minority group's fulfillment is in part contingent on being recognized by the majority nation. In turn, the non-recognition or misrecognition of members of minority societal cultures by the majority can have deleterious effects: it can stunt, impede, or altogether prevent an individual member of a minority cultural group's quest for meaning and fulfillment. More precisely, Taylor argues that the non-recognition of minority cultures means that only the majority culture's vision of the good life is seen as legitimate while the misrecognition of minority's societal culture means that "people or society mirror back to them a confining or demeaning or contemptible picture of themselves" (Taylor, 1992, p. 25).

Limits of Liberalism

The Canadian school of thought's fourth tenet is that the American intellectual tradition of liberalism – perhaps the most widely-known tradition of liberalism due in large part to its preeminent position in legal, philosophical, and political scholarship – provides insufficient remedies for addressing the challenges that minority cultural groups face. According to Taylor (1992, pp. 56-58), this tradition embraces an understanding of liberalism based on a "procedural" moral commitment. This particular understanding of liberalism values only the enshrinement of basic rights and liberties and does not believe that it is the state's duty to describe and institutionalize a single conception of the good life; individuals should be free to abide by their own conception of the good life, albeit within constitutional and legal limits. Therefore, within a context of procedural liberalism, minority nations would not be allowed to institutionalize their societal culture as the common public culture at the sub-national level (i.e., at the provincial or regional level) even though this might ensure its proper recognition and its continuity.

Kymlicka, by contrast, critiques liberal scholar John Rawls' theory of justice. Rawls' theory provides a rational justification for a polity built on "a social democratic principle of economic redistribution to supplement a classically liberal principle of equal individual rights" (Forbes, 2019, p.105). Kymlicka argues that Rawls' theory is based on the assumption that societies are mono-cultural (Ibid.) and that societal cultures are not "primary goods" akin to rights and liberties. Therefore, Rawls' theory of justice cannot provide an adequate theory of justice for multicultural democracies.

Remedies and the Politics of Multiculturalism

The Canadian school of thought's fifth tenet is that there are, nevertheless, remedies for the misrecognition and non-recognition of minorities as well as solutions to the challenges that minority groups face. According to Taylor, one potential remedy for the misrecognition and non-recognition of minorities is the adoption of a "politics of difference" based on a "substantive" (rather than procedural) moral commitment. This substantive liberalism would allow for the potential institutionalization of multiple conceptions of the good life within the same liberal democracy.

In Multicultural Citizenship (1995), Kymlicka describes a "politics of multiculturalism" for liberal democracies. Kymlicka's "politics of multiculturalism" provides three sets of "group-differentiated rights" for minorities that build upon, but do not replace, the protection of individual rights. The following sections outline the three sets of group-differentiated rights (i.e., "self-government," "polyethnic," and "special representation"), the specific minority groups to which they apply (i.e., national minorities, Indigenous peoples, and polyethnic groups), how groups have claimed these rights in liberal democratic states (i.e., "Nature of the rights claim"), and how some states have responded to these claims (i.e., "Mechanisms for recognizing rights claims") through the adoption of a range of policies, measures and institutions.

Self Government

1. **Groups that Claim these rights:** National minorities and Indigenous Peoples
2. **Nature of the rights claim**
   a. "Self-government claims...typically take the form of devolving power to a political unit substantially controlled by the members of the national minority, and substantially corresponding to their historical homeland or territory." (p. 30)
3. **Mechanisms for recognizing rights claims**
   a. Federalism, where boundaries between subnational units are drawn such that the national minority is a majority within its unit.
   b. Asymmetrical federalism
   c. Devolution of powers to tribal/band councils

Polyethnic

1. **Groups that Claim these rights:** Polyethnic groups
2. **Nature of the rights claim**
   a. "...demanding the right freely to express their particularity without fear of prejudice or discrimination in the mainstream society." (p. 30)
   b. "...[demanding] various forms of public funding of their cultural practices." (p. 31)
   c. "...[demanding] exemptions from laws and regulations that disadvantage them, given their religious practices." (p. 31)
3. **Mechanisms for recognizing rights claims**
   a. Anti-racism measures
   b. Recognition of history and the contributions of polyethnic minorities in curricula
   c. Funding of ethnic associations, magazines and festivals
   d. Exemptions of dress codes and Sunday closing laws

Special Representation

1. **Groups that Claim these rights:** National minorities, Indigenous Peoples, and Polyethnic groups
2. **Nature of the rights claim**
   a. "Throughout the Western democracies, there is increasing concern that the political process is 'unrepresentative', in the sense that it fails to reflect the diversity of the population. Legislatures in most of these countries are dominated by middle-class, able-bodied, white men." (p. 32)
3. **Mechanisms for recognizing rights claims**
   a. Making political parties more inclusive by reducing barriers to minority participation
   b. Proportional representation electoral rules
   c. Other forms of "political 'affirmative action'" (p. 32)

Source: Kymlicka, W. (1995). *Multicultural citizenship*. Oxford: Clarendon press, pp. 10-33.

Kymlicka expands on his definition of polyethnic rights in *Politics in the Vernacular: Nationalism, Multiculturalism and Citizenship* (2000). Here, he describes multiculturalism as "fair terms of integration" for polyethnic minorities and argues that "fairness" in the immigrant integration process requires not only that governments engage in the "ongoing, systematic exploration of our common institutions to see whether their rules, structures and symbols disadvantage immigrants" (p. 162) but also that they take active steps to lower barriers to immigrant participation in the private and public spheres of the receiving society. In other words, Kymlicka argues that governments must "accommodate" polyethnic minorities.

The following is a list of the 12 policies identified by Kymlicka that liberal democracies have implemented with the aim of making the integration process fairer:

- Adopting affirmative action programmes which seek to increase the representation of immigrant groups (or women and the disabled) in major educational and economic institutions.
- Reserving a certain number of seats in the legislature, or government advisory bodies, for immigrant groups (or women and the disabled).
- Revising the history and literature curriculum within public schools to give greater recognition to the historical and cultural contributions of immigrant groups.
- Revising work schedules so as to accommodate the religious holidays of immigrant groups. For example, some schools

schedule Professional Development days on major Jewish or Muslim holidays. Also, Jewish and Muslim businesses are exempted from Sunday closing legislation.
- Revising dress-codes so as to accommodate the religious beliefs of immigrant groups. For example, revising the army dress code so that Orthodox Jews can wear their skullcaps, or exempting Sikhs from mandatory motorcycle helmet laws or construction-site hardhat laws.
- Adopting anti-racism educational programmes.
- Adopting workplace or school harassment codes which seek to prevent colleagues/students from making racial (or sexist/homophobic) statements.
- Mandating cultural diversity training for the police or health care professionals, so that they can recognize individual needs and conflicts within immigrant families.
- Adopting government regulatory guidelines about ethnic stereotypes in the media.
- Providing government funding of ethnic cultural festivals and ethnic studies programmes.
- Providing certain services to adult immigrants in their mother-tongue, rather than requiring them to learn English as a precondition for accessing public services.
- Providing bilingual education programmes for the children of immigrants, so that their earliest years of education are conducted partly in their mother-tongue, as a transitional phase to secondary and postsecondary education in English.

Source: Kymlicka, W. (2000). *Politics in the Vernacular: Nationalism, Multiculturalism and Citizenship*. Oxford; Oxford University Press; pp. 152-176.

Limits to Recognition and Accommodation

The Canadian school of thought's sixth main tenet is that there are limits to minority recognition and to minority accommodation. Taylor draws from the case of Québec's language laws – adopted to protect a minority nation's societal culture – to establish what can and cannot be done in implementing a politics of difference. He argues that the implementation of a politics of difference can allow the state to curtail "privileges and immunities that are important" (Taylor, 1992, p. 59) in the pursuit of collective rights; this is consistent with his understanding of liberalism founded on a substantive moral commitment. However, Taylor is also clear that this is where things must stop: a politics of difference cannot and does not allow governments to curtail or do away with fundamental liberties and individual rights.

Kymlicka outlines "limits of tolerance" to multiculturalism understood as "fair terms of integration" for immigrant minorities. He too is very clear about these limits, stating that: "the logic of multiculturalism involves accommodating diversity within the constraints of constitutional principles of equal opportunity and individual rights" (2001, p. 174; emphasis added). Consequently, Kymlicka embraces what he calls a "a liberal egalitarian form of multiculturalism… that respects individual autonomy and responsibility" (2018, p. 81).

In sum, the Canadian school of thought on multiculturalism brings to light the great cultural diversity present in modern liberal democratic states as well as the importance of recognizing and accommodating minority groups, albeit within the limits of the protection of individual rights and liberties. As we shall see, the Canadian school of thought converges with the newly emerging Bristol School of Multiculturalism in one key way, however, both schools also differ in important respects.

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8.3: The Bristol School

Canadian School and Bristol School

Just as the Canadian School of the thought does, the Bristol School of Multiculturalism or "BSM" also views culture as critically important in shaping human existence (Levey, 2018, p. 205). But the BSM is also a response to one of the cornerstones of the Canadian school of thought: Will Kymlicka's normative theory of liberal egalitarian multiculturalism. Table 8.3.1 below highlights the seven key differences identified by Varun Uberoi and Tariq Modood (2018) between the BSM and Kymlicka's liberal egalitarian multiculturalism.

Table 8.3.1: The Two Schools of Thought Compared

Kymlicka's Liberal Egalitarian Multiculturalism	The Bristol School of Multiculturalism
Inspired by Canadian politics and by political events in Canada	Inspired by British politics and by political events in Britain
Discusses three groups: polyethnic minorities, Indigenous peoples, and national minorities	Focuses exclusively "on immigrants who become citizens and their descendants" (p. 960)
Individuals are ultimately more important than groups	Individuals and groups are equally important
Does not address the issue of religious identities	Religion and religious identities are central
Normative analysis based on "existing empirical evidence" (p. 962)	Normative analysis combined with "extensive empirical research" (p. 961)
Developing a liberal theory of minority rights is the main focus	Exploring national identity and conceptions of belonging is a key focus
Benefits of intercultural dialogue are not given that much importance	Benefits of intercultural dialogue are seen to be of central importance

Source: Uberoi, V. and Modood, T. (2019). The emergence of the Bristol School of Multiculturalism. *Ethnicities*, *19* (6), 955-970.

Distinctive BSM Tenets

As a result of its focus on immigration and in light of its key differences with liberal egalitarian multiculturalism, the BSM has also developed a distinct set of tenets. Most notably, the BSM views modern states as a "community of communities" and contends that the principles of equality and fairness of treatment should apply not only to individuals but also to communities themselves. Since all groups are meant to be treated equally, the BSM eschews the distinction between majority and minority groups that is a central tenet of the Canadian school of thought. The BSM also views immigrant integration as the bare minimum that a polyethnic multiculturalism policy can achieve. Rather, the BSM's "master principle...[is] the crucial importance of a sense of belonging in one's society" (Levey, 2018, p. 209). In brief, the BSM's version of multiculturalism views immigrants as active contributors to the re-conceptualization of national symbols and national myths.

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8.4: Multiculturalism's Variants

Liberal Democracies

From the mid-20th century onwards, governments across liberal democracies have implemented public policies that recognize cultural diversity and set out to accommodate minority cultural groups, albeit in varying ways and to different extents. For instance, governments in four liberal democratic states – Canada, the Netherlands, Australia and Sweden – implemented a policy of "official multiculturalism." That is to say, they implemented a national-level policy that formally recognized the multicultural nature of their society – focusing specifically on polyethnic diversity – and pledged to make the process of immigrant integration fairer. Other democracies have adopted a range of "multiculturalism policies" despite never implementing a policy of official multiculturalism. And, as we shall see, multiculturalism has even caught on as a public policy in environments that, on the surface, seem inhospitable to the recognition and accommodation of minority cultures.

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8.5: Official Multiculturalism

Canada

Canada was the first liberal democracy to officially adopt multiculturalism as a national-level public policy. On October 8, 1971, Prime Minister Pierre Elliott Trudeau declared in a speech to the House of Commons that Canada's federal government would, from that point on, implement a policy of "multiculturalism within a bilingual framework". The four main objectives of Canada's policy of "multiculturalism within a bilingual framework" include:

- First, resources permitting, the government will seek to assist all Canadian cultural groups that have demonstrated a desire and effort to continue to develop a capacity to grow and contribute to Canada, and a clear need for assistance, the small and weak groups no less than the strong and highly organized.
- Second, the government will assist members of all cultural groups to overcome cultural barriers to full participation in Canadian society.
- Third, the government will promote creative encounters and interchange among all Canadian cultural groups in the interest of national unity.
- Fourth, the government will continue to assist immigrants to acquire at least one of Canada's official languages in order to become full participants in Canadian society.

The six programs of implementation of Canada's policy of multiculturalism include:

- Program I: Multicultural Grants. Activities eligible for federal assistance will include multicultural encounters; organizational meetings for new cultural groups; citizenship preparation and immigrant orientation programs; conferences; youth activities; cultural exchanges between groups as well as other multicultural projects.
- Program II: Culture Development Program. A culture development program will be instituted to produce much-needed data on the precise relationship of language to cultural development.
- Program III: Ethnic Histories. The Citizenship Branch will commission 20 histories specifically directed to the background, contributions and problems of various cultural groups in Canada.
- Program IV: Canadian Ethnic Studies. The Department of the Secretary of State will...undertake a detailed investigation of the problems concerned with the development of a Canadian ethnic studies program or center(s) and will prepare a plan of implementation.
- Program V: Teaching of Official Languages. The Federal government...proposes to undertake discussions with the provinces to find a mutually acceptable form of federal assistance towards the teaching official languages to children.
- Program VI: Programs of the Federal Cultural Agencies. The programs they will be undertaking will enable all Canadians to gain an awareness of the cultural heritable of Canada's ethnic groups.

Source: Canada, Parliament, *House of Commons Debates*, 28th Parl, 3rd Sess, Vol 8 (8 October 1971)

According to Hugh Donald Forbes, Canada's policy of "official multiculturalism within a bilingual framework" was intended not only to serve the purpose of minority recognition and minority accommodation; the government also deployed official multiculturalism as part of a "national unity strategy" (Forbes, 2018, p. 34) to counteract mobilization for independence in Québec in the wake of the province's "Quiet Revolution." As a result, Québec scholars criticize Canada's policy of "multiculturalism within a bilingual framework" for impinging on a national minority's rights to self-government. In turn, some of these scholars have developed an alternate model of immigrant integration – interculturalism – which is discussed later in this chapter (see section 8.3).

Canada's federal government reinforced and expanded the country's commitment to official multiculturalism in 1982 and 1988. In 1982, the Canadian Constitution Act achieved royal assent leading to the enshrinement of the Canadian Charter of Rights and Freedoms. Section 27 of the Charter requires that "The Charter shall be interpreted in a manner consistent with the preservation and enhancement of the multicultural heritage of Canadians" (Canadian Charter of Rights and Freedoms, 1982, S.27). In 1988, the Mulroney government passed the Canadian Multiculturalism Act of 1988. The Act created the Department of Multiculturalism and the position of Minister of Multiculturalism, renamed Canada's official multiculturalism policy the "multiculturalism policy of Canada", and specified federal institutions' duties and responsibilities in implementing the policy.

The Netherlands

The Netherlands is the first and, to date, the only Western European country to adopt a policy of official multiculturalism. Dutch official multiculturalism is commonly viewed as the by-product of the "Minority Memorandum" (or minderhedennota), a White Paper on immigration and integration published by the Dutch government in 1983. In this document, the government identified 15 polyethnic minority groups present in the Netherlands and promised to ensure the fair and equal legal treatment of members of these minority groups and to lower barriers to minority participation in Dutch society. The Dutch government adopted official multiculturalism following a string of terrorist attacks committed by Moluccan immigrants and in the face of clear evidence of striking socio-economic disparities between the national majority and polyethnic minorities.

Australia

The origins of official multiculturalism in Australia can be traced to the release of the Galbally Report (i.e., "Report on the Review of Post-Arrival Programs and Services to Migrants") in 1978. The government commissioned the report after ending racial restrictions in immigration, which resulted in an increase in immigration from Southeast Asia. After the Galbally Report was issued, the Australian government established the Australian Institute of Multicultural Affairs (AIMA) in 1979. The government's principal objectives in creating the AIMA include:

- to develop among the members of the Australian community:
  - an awareness of the diverse cultures within that community that have arisen as a result of the migration of people to Australia; and
  - an appreciation of the contributions of those cultures to the enrichment of that community;
- to promote tolerance, understanding, harmonious relations and mutual esteem among the different cultural groups and ethnic communities in Australia;
- to promote a cohesive Australian society by assisting members of the Australian community to share with one another their diverse cultures within the legal and political structures of that society; and
- to assist in promoting an environment that affords the members of the different cultural groups and ethnic communities in Australia the opportunity to participate fully in Australian society and achieve their own potential.

Source: Australia, *Australian Institute of Multicultural Affairs Act 1979*, Part II; Section 5.

There have been two subsequent iterations of Australia's official multiculturalism policy, both of which were marked by the release of a national-level policy document. In "The National Agenda for a Multicultural Australia" (1989), the Australian government declared its duty to protect the rights of immigrants to preserve their cultural identity but also highlighted an immigrant's obligation to adhere to the rules and values of Australian society. In "Multicultural Australia: United in Diversity" (2003), the government identified the need to promote "community harmony and social cohesion" (p. 6) post-September 11, 2001 and articulated the importance of official multiculturalism as a means of ensuring both national unity and national security.

Sweden

Sweden implemented a policy of official multiculturalism partly in response to labour migration and to rights claims by the country's Finnish-speaking minority. However, according to Karin Borevi (2012), the decision to implement a multiculturalism policy at the national level was also made because "it fitted in well with the national self-image developed in the post-war period of Sweden as a pioneer in human rights issues" (p. 145). Swedish official multiculturalism is rooted in the 1975 Immigrant and Minority Policy. The Policy outlined three main objectives: 1. "[ensuring] that immigrants were provided with conditions equal to those of the native population" (ibid, pp. 143-144); 2. Giving immigrants the choice to determine the degree to which they would retain their culture, on the one hand, and integrate into Swedish society, on the other; and 3. Promoting "partnership [between]...immigrant and minority groups" (ibid; p. 144).

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8.6: Multiculturalism Policies

Multicularism Policy Index

Although Sweden, Australia, the Netherlands, and Canada have all implemented a national-level multiculturalism policy, the vast majority of liberal democracies have not. Does this mean that these democracies do not recognize and accommodate minority societal cultures? The Multiculturalism Policy Index (MPI) developed by researchers at Queen's University provides an answer to this question. The MPI is based in large part on Will Kymlicka's categorization of group-differentiated rights for polyethnic minorities, Indigenous peoples, and national minorities. Using this categorization as a starting point, the MPI identifies 23 "multiculturalism policies" (MCPs) that governments can employ to recognize, protect and preserve minority cultures and, in the case of immigrant (i.e., polyethnic) minorities, to make the integration process fairer.

The 23 MCPs organized by group include:

Immigrant Minorities

- Constitutional, legislative or parliamentary affirmation of multiculturalism at the central and/or regional and municipal levels and the existence of a government ministry, secretariat or advisory board to implement this policy in consultation with ethnic communities
- The adoption of multiculturalism in school curriculum
- The inclusion of ethnic representation / sensitivity in the mandate of public media or media licensing
- Exemptions from dress codes (either by statute or court cases)
- Allowing of dual citizenship
- The funding of ethnic group organizations or activities
- The funding of bilingual education or mother-tongue instruction
- Affirmative action for disadvantaged immigrant groups

Indigenous Peoples

- Recognition of land rights/title
- Recognition of self-government rights
- Upholding historic treaties and/or signing new treaties
- Recognition of cultural rights (language; hunting/fishing)
- Recognition of customary law
- Guarantees of representation/consultation in the central government
- Constitutional or legislative affirmation of the distinct status of indigenous peoples
- Support/ratification for international instruments on indigenous rights
- Affirmative action

National Minorities

- Federal or quasi-federal territorial autonomy
- Official language status, either in the region or nationally
- Guarantees of representation in the central government or on constitutional courts
- Public funding of minority language universities/schools/media
- Constitutional or parliamentary affirmation of multinationalism
- According international personality (e.g., allowing the substate region to sit on international bodies)

Source: Multiculturalism Policy Index. Retrieved from: http://www.queensu.ca/mcp/ (accessed: 2021-03-22)

The two main aims of the MPI are to "[monitor] the evolution of multiculturalism policies in 21 Western democracies" and "to provide information about multiculturalism policies in a standardized format that aids comparative research and contributes to the understanding of state-minority relation" (Multiculturalism Policy Index). The MPI provides a score of "1" for an MCP if it has been fully adopted, a score of "0.5" if it has been partially adopted, and a score of "0" if the policy has not been adopted. Table 8.6.1 below highlights the 16 countries[1] without a national-level multiculturalism policy (i.e., without the

"Constitutional, legislative or parliamentary affirmation of multiculturalism" at the national level) and highlights their respective "Immigrant Multiculturalism" score for the year 2010, the most recent year examined in the MPI.

Table 8.6.1: Immigrant Multiculturalism in Countries Without Official Multiculturalism (2010)

Country	Immigrant MCP Score (out of 8)
Austria	1.5
Denmark	0
France	2
Germany	2.5
Greece	2.5
Ireland	4
Italy	1.5
Japan	0
Netherlands	2
New Zealand	6
Norway	3.5
Portugal	3.5
Spain	3.5
Switzerland	1
United Kingdom	5.5
United States	3

Source: Multiculturalism Policy Index. Retrieved from: http://www.queensu.ca/mcp/ (accessed: 2021-03-22)

As one can clearly see, the non-implementation of official multiculturalism does not prevent governments from designing and implementing a range of MCPs. In other words, a vibrant and active "politics of multiculturalism" can be present in a liberal democracy even if there is no formal national-level mandate to recognize and accommodate minority cultures.

[1] Belgium has been excluded from this table, given that the MPI states that it shows "evidence of an "intercultural" policy approach". As we shall see later on in this chapter, in section 10.3, there are important differences between multiculturalism and interculturalism.

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8.7: Multiculturalism in Inhospitable Environments

United States

A “politics of multiculturalism” can also develop in liberal democracies that by all appearances should be inhospitable to the recognition and accommodation of minority groups. As we saw in the preceding section, the American tradition of liberalism is implicitly mono-cultural and embraces a procedural moral commitment that is insufficient for the recognition of minority cultures. Furthermore, the word “multiculturalism” is often negatively associated in the United States with a form of campus politics that arose in the late 1980s and early 1990s that, its critics argue, promotes ethnic separatism. In fact, the word “multiculturalism” is largely absent in American public and legislative discourse and, when it is used, it is sometimes articulated as a threat to the American ideal of the “melting pot”. Yet, since the 1960s, American governments have designed and implemented a number of policies intended to lower the barriers to social and political participation for immigrants with limited English proficiency. This has included the adoption of policies of bilingual education, minority language assistance in voting, and language accommodation in the delivery of public services. Furthermore, according to the MPI, the United States practices one of the most extensive forms of Indigenous multiculturalism, receiving a score of 8/9 for the year 2010 (Multiculturalism Policy Index; Evidence; United States).

UK

In Britain, the contrast between opposition to multiculturalism and its implementation is perhaps even more striking. At the turn of the millennium, the Blair New Labour government rejected in no uncertain terms a proposal that Britain adopt a declaration of cultural diversity patterned after Canada’s policy of official multiculturalism. Nevertheless, Britain subsequently underwent a true multicultural policy revolution entailing, among other developments, the British Broadcasting Corporation’s adoption of a multi-faith mandate in 2006, diversity-oriented revisions to the national curriculum, and the extension of positive action (i.e., affirmative action) measures to cover religion and belief in 2010.

Conclusion

In brief, multiculturalism has blossomed and can blossom in environments that seem less than amenable to recognizing and accommodating minority groups. In addition, multiculturalism’s development in public policy in Britain as well as in the United States shows that there is often a disjuncture between what elected officials say about the recognition and accommodation of diversity and what governments actually do to make the process of immigrant integration fairer.

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8.8: Multiculturalism's Near and Longer-Term Prospects

Multiculturalism's Future

Multiculturalism’s future is uncertain despite the adoption and implementation of multiculturalism policies across liberal democracies and even in contexts that would seem to be inhospitable to the implementation of group-differentiated rights. This section highlights three major developments that bring into question multiculturalism’s near and longer-term prospects in the 21st century.

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8.9: Multiculturalism's Rivals

Civic Integration

Multiculturalism, as a model of immigrant integration, is no longer the only game in town, as other public policies are now being deployed to to deliver integrationist outcomes. One of multiculturalism's main rivals are the civic integration policies, as they have come to be known, that governments in a number of European democracies have adopted. These policies make it an immigrant's responsibility – as a precondition for permanent residency and citizenship acquisition – to demonstrate basic fluency in the national majority's language as well as an understanding of the national majority's key societal values. While civic integrationism (i.e., the guiding public philosophy behind civic integration policies) embraces an open-ended conception of national identity that can be shaped by immigrants and that can reflect a diversity of cultures, it nonetheless views the protection and preservation of minority cultures as a private affair and not the responsibility of government and public institutions. Some observers argue that the design and implementation of civic integration policies in the Netherlands in the late 1990s and early 2000s is evidence of the "retreat" of Dutch multiculturalism.

Muscular Liberalism

Another alternative to multiculturalism is muscular liberalism, a term coined by former British Prime Minister David Cameron in a speech he gave at the Munich Security Conference on February 5, 2011. In his speech, Cameron advanced muscular liberalism as a policy alternative to New Labour's "doctrine of state multiculturalism". He argued that this doctrine had "encouraged different cultures to live separate lives, apart from each other and apart from the mainstream" (Cameron, 2011) and, in so doing, had exacerbated issues of extremism and radicalisation in some British minority communities. By contrast, Cameron's policy of muscular liberalism would deliver integration by "making sure that immigrants speak the language of their new home" (ibid), by instilling a sense of "common purpose" (ibid) in members of majority and minority communities, and by creating a program (i.e., the National Citizen Service) to encourage youths aged 16 and 17 from diverse backgrounds to interact with each other and engage in team-building exercises. Muscular liberalism was implemented in a variety of ways during the two Cameron Conservative governments (2010–2016), most notably in a provision in the Counter-Terrorism and Security Act 2015 requiring that authorities "prevent people from being drawn into terrorism" (Counter-Terrorism and Security Act 2015, c. 6, Part 5, Chapter 1, Section 26) and in reforms to the national curriculum requiring that public schools promote "British values."

Interculturalism

Interculturalism is an integrationist alternative to multiculturalism that is distinctly Québécois in its origins. Interculturalism has two key tenets: 1. An openness to immigration and a receptiveness to cultural diversity and 2. Ensuring the continuity of the majority culture which, in the case of Québec, is the culture of a nation that was forcibly incorporated into the Canadian state. Interculturalists point to the deployment of official multiculturalism in Canada in response to the rise of Québécois nationalism as evidence of multiculturalism's blind spot when it comes to protecting minority nations. Thus, they argue, an alternative integrationist model is needed to ensure both "fair" immigrant integration as well as the continuity of the minority nation's societal culture. The development of interculturalism as a public philosophy is most readily associated with a series of recommendations issued by the Commission on Accommodation Practices Related to Cultural Differences; the Commission was launched by the Charest Liberal government in 2007 and was co-chaired by Charles Taylor and sociologist Gérard Bouchard.

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8.10: A Shift in the Ideological Environment

Rightward Shift

Another major development that threatens multiculturalism's continued implementation is the shift to the ideological right in national-level politics that is occurring across democracies. This shift is evidenced by the formation of new center-right governments, by the rise and mainstreaming of far-right political factions, and by the struggles and decline of center-left political parties. This shift has created in its wake an ideological environment that is less than conducive to multiculturalism's survival as an ideology and as a policy option. Why is this so? The adoption and implementation of multiculturalism policies has generally occurred under social democratic and center-left governments. Additionally, multiculturalism is logically consistent with social democratic and reform liberal ideologies given their openness to radical forms of change and their desire to redress imbalances in power. By contrast, the political right tends to oppose cultural accommodation and minority recognition and to promote integrationist alternatives to multiculturalism highlighted above. There are also major logical inconsistencies between various ideologies of the right and multiculturalism, as one can see in Table 8.10.1 below. These inconsistencies suggest that if the ideological pendulum continues to shift to the right across liberal democracies, multiculturalism policies may be at risk.

Table 8.10.1*: Logical Inconsistencies between Ideologies of the Right and Multiculturalism*

Ideologies of the Right	Multiculturalism
Tends to embrace a mono-cultural ideal of society	All societies are multicultural and common public institutions should reflect diversity
Tends to be biased in favour of maintaining the status-quo	Often requires radical and rapid change as well as the creation of new institutions
Tends to value negative freedom, which is to say protection from the state	The state is necessary to protect the rights of minorities (consistent with positive freedom)
(neo-conservatism) values the individual over the group	(the BSM) views individuals and groups as equally important
Tends to value small government, limited government intervention in society	Government intervention needed to redress the power imbalance between majority and minority groups

Source: Tremblay, Ar. (2018). *Diversity in Decline? The Rise of the Political Right and the Fate of Multiculturalism*. Cham, Switzerland; Palgrave Macmillan, pp. 2-3

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8.11: Conclusion- Multiculturalism's Limitations

Concluding Remarks

Multiculturalism's fate might also be sealed for an altogether different reason; it may simply no longer be what is needed to remedy injustices and to protect minority groups in liberal democracies. In the last decade, we have witnessed unprecedented mobilization around issues of diversity and identity. However, social movements such as Idle No More, the Dakota Access Pipeline protests, Rhodes Must Fall, the Catalan independence demonstrations, and Black Lives Matter have largely avoided using the word "multiculturalism". Rather, these movements have developed and mainstreamed a diversity-oriented discourse built on the ideas and principles of decolonization, Indigenization, sovereignty and anti-racism. Furthermore, a growing number of scholars, including Will Kymlicka himself, have pointed to multiculturalism's limitations in addressing anti-Black and anti-Indigenous racism. Consequently, it may now be time for the development of a new politics of diversity in liberal democracies that can achieve racial equality and ensure the recognition of minority cultures.

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- **Bristol School of Multiculturalism (BSM):** An emerging intellectual tradition in the United Kingdom that views society as a "community of communities" and treats individuals and groups as equally important. It emphasizes religious identity and the benefits of intercultural dialogue.
- **Canadian School:** A foundational intellectual tradition led by philosophers Charles Taylor and Will Kymlicka. It focuses on "societal cultures" and argues that minority groups require specific group-differentiated rights and recognition to achieve fulfillment.
- **Civic Integration Policies:** Policies adopted by several European democracies that make it the immigrant's responsibility to demonstrate fluency in the national language and an understanding of key societal values as a precondition for residency or citizenship.
- **Dialogical Subjects:** A concept proposed by Charles Taylor suggesting that human beings define their identities through dialogue with others and through "rich human languages of expression".
- **Good Life:** A philosophical concept referring to a state beyond mere existence, where human beings achieve fulfillment, satisfaction, and meaning.
- **Group-Differentiated Rights:** Specific rights claimed by minority groups to address unique challenges; these are categorized into self-government rights, polyethnic rights, and special representation rights.
- **Interculturalism:** An integrationist alternative to multiculturalism originating in Québec. It balances an openness to diversity with a commitment to ensuring the continuity of the majority (but sub-state) culture.
- **Liberal Egalitarian Multiculturalism:** Will Kymlicka's theory that advocates for the accommodation of diversity within the strict constraints of constitutional principles, individual rights, and equal opportunity.
- **Majority Nation:** A cultural group whose shared history, language, and values are reflected in and embodied by the state's institutions, national symbols, and ideals of citizenship.
- **Minority Nation:** A territorially concentrated political community that once possessed political autonomy but was forcibly incorporated into a larger state.
- **Multiculturalism (Demographic):** The use of the term to describe the actual racial, linguistic, and religious diversification of a society.
- **Multiculturalism (Public Philosophy):** A specific set of moral and ethical guidelines defining how modern societies and governments should approach and manage diversity.
- **Multiculturalism (Public Policy):** Specific government policies designed to formally recognize and accommodate minority cultural groups.
- **Multiculturalism Policy Index (MPI):** A research tool that monitors the evolution of 23 specific multiculturalism policies across 21 Western democracies to provide standardized data for comparative research.
- **Muscular Liberalism:** A policy alternative that rejects "state multiculturalism" in favor of instilling a common national purpose, proficiency in the national language, and interaction between diverse backgrounds to prevent extremism.
- **Official Multiculturalism:** A formal national mandate where a government officially recognizes the multicultural nature of its society, such as those implemented in Canada, Australia, Sweden, and the Netherlands.
- **Politics of Difference:** A substantive liberal approach advocated by Charles Taylor that allows for the institutionalization of multiple conceptions of the "good life" within a single democracy to ensure minority recognition.
- **Polyethnic Minorities:** Minority communities that emerge as a result of individual and familial immigration.
- **Procedural Liberalism:** An American tradition of liberalism that values the enshrinement of basic rights but believes the state should remain neutral and not institutionalize any single conception of the "good life".
- **Recognition/Misrecognition:** The process by which an individual's identity is defined by their dialogue with others; misrecognition occurs when society mirrors a demeaning or contemptible picture back to members of a minority group.
- **Societal Culture:** An intergenerational community that is more or less institutionally complete, shares a territory and language, and provides its members with a set of values and a sense of life's purpose.
- **Substantive Liberalism:** A framework that allows the state to pursue collective goals (such as the continuity of a minority culture) while still protecting fundamental individual rights and liberties.

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8.14: Discussion Questions

1. The Canadian School of thought argues that an individual's identity is "dialogical" and that "misrecognition" by the majority can have "deleterious effects" on a minority group's quest for fulfillment. In a liberal democracy, to what extent is the state responsible for ensuring that all cultural groups feel "recognized" rather than just "tolerated"?
2. Countries like the United States and Britain have historically seen strong political rhetoric against multiculturalism, yet both have implemented extensive multicultural policies (MCPs) such as multi-faith media mandates or bilingual education. Why might a government choose to implement multiculturalism in practice while publicly rejecting it as a philosophy?
3. Alternatives like "muscular liberalism" suggest that multiculturalism has encouraged cultures to live "separate lives" and that a focus on "common purpose" and national values is needed to prevent extremism. Does this model effectively address the needs of minority groups, or does it risk returning to a "mono-cultural" ideal that ignores the "politics of difference"?
4. The sources suggest a "logical inconsistency" between ideologies of the right (which value "negative freedom" and small government) and multiculturalism (which requires state intervention to redress power imbalances). If center-right and far-right parties continue to gain influence, can multiculturalism survive as a policy, or will it be forced to retreat into the "private affair" of individuals?
5. Modern movements like Black Lives Matter and Idle No More often avoid the word "multiculturalism," focusing instead on "decolonization" and "anti-racism". Given that even scholars like Will Kymlicka acknowledge multiculturalism's "limitations in addressing anti-Black and anti-Indigenous racism," is it time to replace multiculturalism with a different "politics of diversity," and what would that look like?

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9: FEMINISM

Introduction

Although the bulk of dominant Western political philosophy has been focused on the realization and conditions of equal citizenship, justice, and the ideal society, most of these conversations historically have focused on abstract concerns relating to the rights and freedoms of the individual or the primacy of the community. Much of the classic literature remained silent on or inadequately dealt with the kinds of exclusions that pertain to the diverse complexities of differences constitutive of a given bodypolitik, be they related to conceptions of sex/gender, heterosexuality, race/ethnocultural identity, indigeneity, nationality, age or physical/mental ability, to name just a few. Over the past three hundred years, critical feminist theorists have explored and theorized the boundaries of equality and difference, with increasing attention being given to the multiple contexts, meanings and influences complicating their conceptual and practical relationships as well as their intersection with issues of identity, subjectivity, representation, and democratic citizenship as a concept and as a practice that plays out through democratic institutions and other public bodies.

In this chapter, I will trace a typology of the different variants of critical feminist theories of emancipation, feminisms plural, or what I understand to be the pivotal expression and intellectual contributions throughout history of women's democratic thought leadership. I begin by introducing Squires' (1999) typology of feminist thought and then build upon this framework to offer an extended typology that augments our conceptualization to take into account a more nuanced differentiation of key variants of contemporary feminisms. Distinct from post-modern forms of diversity feminism that reject and abandon political and legal categories as oppressive, I add a fourth variant of what I call "intersectional feminisms" that aim to displace outdated status-based categories through the reconstruction of new emancipatory legal norms and democratic practices.. Further, a fifth variant of civil republican intersectional feminism aim at a displacement of liberal individualism itself and the impoverished framing of "liberty" in late modern times. Rather, this last variant aims for a holistic reconstruction of the interdependence of public and personal liberty through the emancipatory promise of self-government and radically representative democratic politics. These latter, intersectional feminisms bring a renewed faith in the ethical promise of self-government, the rule of law and self-government as a system of government, as well as representative democratic citizenship as an emancipatory system of freedom and intersectionally diverse self-determination capable of sustaining democratic equality for all components parts of the political community.

This text presents a comprehensive typology of feminist political thought, tracing its evolution from early struggles for formal equality to modern intersectional and republican frameworks. The author examines how different branches of feminism address the tension between gender neutrality and the celebration of feminine differences. While postmodern feminism seeks to deconstruct the very categories of sex and gender, reconstructivist intersectional feminisms focus on reforming legal and political institutions to better reflect the diverse lived experiences of all people. The source specifically advocates for radical representation and electoral reforms, such as gender quotas, to dismantle historical hierarchies within democratic systems. Ultimately, the text argues for a civic republican model where self-government is defined by collective power-sharing rather than mere individualist liberty.

Learning Objectives

- Differentiate between the five core variants of feminist thought presented in the late modern typology, identifying the unique epistemological foundations and goals of equality, difference, postmodern diversity, reconstructivist intersectional, and civic republican intersectional feminisms.
- Analyze the shift in feminist strategies for social transformation, from early "equality politics" seeking inclusion in existing neutral structures to contemporary "displacement politics" that aim to deconstruct gender binaries and reconstruct political-legal categories.
- Evaluate the role of intersectionality in addressing the historical internal exclusions within feminist movements and explain how it serves as a reconstructive tool for centering the diverse experiences of "womxn" in law and policy.
- Examine the critique of liberal individualism offered by civic republican intersectional feminism and describe its proposed alternative of "relational liberty" as a collective praxis of self-government and power-sharing.

- Assess the proposed institutional reforms, such as intersectional electoral quotas and the reconstruction of parliaments, intended to dismantle anti-democratic hegemonies and realize the promise of radically representative democratic politics.

9.1: Typology of Feminisms

9.2: Equality Politics Through Liberal Feminisms

9.3: Difference Politics Through Maternal/Radical Feminisms

9.4: Diversity Politics Through Postmodern Feminisms

9.5: Diversity Politics Through Reconstructivist Intersectional Feminisms

9.6: Displacement Through Feminist Reconstruction of Diverse Legal Norms

9.7: Displacement Through Feminist Reconstruction of Diverse Parliaments

9.8: Civic Republican Intersectional Feminism

9.9: Displacement of Individualist Liberty Through Feminist Republican Reconstruction of Intersectional Political Liberty

9.10: Conclusion

9.11: Glossary

9.12: References

9.13: Discussion Questions

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9.1: Typology of Feminisms

Squires' Typology

Making a central contribution to political theory, in Gender and Political Theory (1999), Judith Squires develops three archetypal approaches to the question of subjectivity that have emerged in response to the persistent blind spots within mainstream political theory. Squires' typology situates feminist theory within three core approaches and assumptions that guide the knowledge claims of political theory itself: objectivity, interpretation, and genealogy. From the perspective of objectivity, the project of political theory would be 'the elaboration of abstract universal values.' If we follow the interpretative frame, the goal of the political theorist is to 'uncover and interpret the values which already exist within concrete communities'. The third approach sees the goal of political theory as 'deconstructing meaning claims in order to look for the modes of power they carry and to force open a space for the emergence of counter-meanings' (Ferguson, quoted in Squires, 1999, p. 81).

In short, Squires' typology helps us make sense of the varying currents of feminism, their ideological foundations and the tactics of intervention each strand privileges in the pursuit of social transformation through tactical strategies of change agency in their practitioner iterations across various parts of society. Squires sees these three approaches as having distinct orientations to the concept of subjectivity, and she specifically argues that these three feminist projects or worldviews can be mapped onto a logic of 1) an equality politics aimed at inclusion through the presumed neutrality of the universal subject, 2) a difference politics aimed at reversing patriarchal values through affirmations of the feminine, and 3) a diversity politics aimed at deconstructing traditional categories of analysis so as to displace the male/female binary underpinning the false dichotomies of modernist thinking.

Each of these families of feminist theorizing has problematized the "equality/difference" debate from varying perspectives. An important consequence of their different epistemological foundations lies in the kinds of feminist strategies prescribed in the pursuit of emancipatory social transformation. Bock and James (1992, p. 4) note the confusion that can emerge from situations wherein "women's liberation has been seen sometimes as the right to be equal, sometimes as the right to be different". In her exploration of these themes, British theorist Phillips (1993, pp.55-56) notes the increasing "feminist impatience with abstract universals of the Enlightenment tradition" whereby equality is reduced to mean equality as sameness to Man; they argue that "feminism contained within itself a double impetus towards both equality and difference" that leads to a productive emphasis on "heterogeneity, diversity and difference."

Before continuing, it is important to comment on the various competing significations of the concepts of equality, difference and diversity in light of the national and historical contexts of the societies within which feminist theorizing occurs. All of women's thought leadership towards democratization has been placed within a specific historical and ethnocultural context. The core concepts within feminist theory likewise reference different legacies of democratic struggle. For example, the formalistic notion of "equality" is associated with Squires' first family of American feminist theory, but it stands in stark contrast to the conception of "equality" advanced by neighbouring Canadian and Québécois movements from the late 1970s to the present.

Typologies are always schematic. Squires herself acknowledges this, and she also stresses the possibility of all three strands of feminism existing together within the same society. There is no presumption that an "equality politics" would evolve into a "difference politics" and ultimately progress into a "diversity politics" as a natural progression. Indeed, the past few decades of neo-liberal revisionism have resulted in a contemporary form of neo-liberal "equality politics" defended by neo-conservative women within Canada[1], Québec and the United States.

Neoliberalism

Neoliberalism is grounded upon the idea that less government interference in the free market is the "central goal" of democratic politics. By "neoliberal revisionism", we mean to critique the erasure of the ethical value of modern forms of "liberal democracy," and which aim merely at "less government interference", and fail to aspire to realize the emancipatory and liberty-enhancing promise of democracy as a form of collective socio-economic cooperation and self-government.

[1] The role of women within the Conservative government and within R.E.A.L. Women of Canada, women within the *Action démocratique du Québec* and, notably, key women within Republican Party are one such manifestation.

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9.2: Equality Politics Through Liberal Feminisms

Liberal Feminism

The first theoretical orientation within Squires' typology of feminist theory has centred on a strategy of equality that seeks the inclusion of women within the existing political structures, which were understood to be neutral to sexual differences and ought to continue to be indifferent to sexual differences. The goal was not to transform existing structures, which were taken to be legitimate in their neutrality. Rather, early feminist theory problematized biological determinism that assumed that sex determined one's destiny, social and cultural characteristics or roles. Distinguishing between sex and gender, the first important advance within feminist theory flowed from social constructivist approaches of "equality feminism" that sought to construct gender as a cultural product so as to locate the sources of women's oppression in sex-specific social practices rather than in their biology per se.

Following the insights of Simone de Beauvoir, much of Anglo-American equality feminism asserted that, regardless of their "sex", women could also behave in ways that were rational, individualistic, and competitive in a manner similar to men, but that they had been socially conditioned into inferior roles and attributes through culture. Squires (1999, p. 117) suggests that this strategy resulted in an "equality politics" that accepted the universal ideal of neutrality as well as a conception of individuals as rational and autonomous. In this view, gender difference is seen as an effect of sexism used to legitimate inequality between the sexes, not a foundational difference. Strategies that emerged out of this equality politics assumed that in order for inclusion to be achieved, female differences coded as inferior ought to be transcended through the creation of a political sphere that is gender-neutral, thus restoring women's common equivalence and human value to be seen on par with that of men.

The project of inclusion aimed to assert that gender should not be politically relevant. Despite these attempts to distinguish between the facticity of sex differences and the construction of male supremacist gender differences, the logic of sex/gender was comforted and mapped onto dualist thinking of the mind/body duality. This led to a hierarchical structure that positioned the mind (masculine) in a position of superior, rationalist control over the emotions and body (feminine) and was infused in the symbolic hierarchical ordering of male/female and masculine/feminine. In fact, the strategy of gender neutrality ended up looking a lot like male dominance in practice.

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9.3: Difference Politics Through Maternal/Radical Feminisms

Radical Feminism

Given the unequal status and disparate enjoyment of citizenship that women continued to experience despite the arrival of formal equality, the second family of feminist theorists identified by Squires renounced the strategy of gender-neutrality. Moving towards a relational structuring of power between men and women, the second variant of feminism located women's subordination in cultural attitudes about sex/gender and nature/nurture rationalist logic as well as in macro-level practices that structured women's positioning as inferior to their male counterparts throughout the public and private spheres of society.

Rejecting the notion that gender neutrality as a forced assimilation of women into the male model of individuality could ever be possible, let alone empowering in practice, the second family of feminist theorizing mobilized around strategic affirmations of the feminine and female ways of being or doing and around the celebration of women's differences. Taking what had historically been coded as weakness, inferiority, vulnerability and the source of subordination, the objective of maternal feminism was to oppose and reverse patriarchal values that denigrated women's differences from men; rather, these traits associated with women as "nurturing, peace-loving, intuitive and emotional" would be actively celebrated as a strength (Squires, 1999, p. 118).

These theorists, described as radical feminism, maternal feminism and/or cultural feminists, aimed to protect, or at least ensure, a re-valuing of the distinct perspectives of male and female gendered identities, regardless of whether their origins were grounded in biological, structural and/or socially constructed differences (Bock & James, 1992, p.1-16). They argued for the need to affirm not only women's characteristics, but also their social roles, and to encourage all of humanity to equally value both feminine and masculine traits for their unique contributions to society. Seen as a duality that is complementary, by affirming the equal value of womanhood to manhood, and the particular value to society that women's differences make, difference feminism sought to restore the realm of affectivity, emotions, connectedness, an ethic of care, and those activities or characteristics aligned with the feminine. This strategy of values reversal aimed to unleash a reconfiguration and even a re-ordering of the political sphere to make it more open to women and perhaps even positively aligned with the superior qualities flowing from the gendered specificity of women's experiences. Rather than resulting in an inclusive public and private sphere grounded upon the dual contributions of the feminine and masculine, the legacy of the patriarchal ordering of sex/gender and the ongoing persistence of male supremacy has meant that efforts to value the symbolically stereotypical notion of the feminine have only reinscribed and inadvertently comforted the maintenance of traditional divisions of labour along gender lines. This has not ultimately led to the restoration of women's bodies to a common equivalence to men's bodies, nor has it led to the human value of the feminine being seen and honoured on par with that of the masculine in practice.

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9.4: Diversity Politics Through Postmodern Feminisms

Postmodern Feminisms

Contemporary debates over the paradoxical nature of equality and difference have been re-articulated to unleash a third current within feminist theory mobilized behind a normative commitment to diversity that moves strategically beyond the duality and tired binary logic of sex/gender altogether. Focused on complicating the circular debates around equality and/vs difference, this current postmodern feminism invokes a strategy of displacement of the categories of sex/gender as the foundation of human intelligibility. This strategy aims to unleash the inherent diversity of humanity that is masked by hegemonic understandings of sex/gender as a natural and foundational element of the bodies of women and men.

Whereas equality and difference feminist constructivism look to understand how men and women become masculine and feminine subjects, deconstructivist feminism invokes the Foucauldian notion of discourse. This approach within feminist theorizing is interested in the relational construction and deconstruction of gender through power, language or discourse and situates sex/gender in a relational dialogue with a broader mapping of diverse corporeality. In this logic, gender is both "the material effect of the way in which power takes hold of the body and an ideological effect of the way power 'conditions' the mind" (Squires, 1999, p.64). In this context, "gender becomes a fundamentally political category" (Squires, 1999, p.60) that no longer presumes sex to be foundational, nor posits a causal connection between sex and gender, however culturally elaborated.

If the meaning of femininity or masculinity are empty of any set meaning, they need not be restricted to the material bodies of the female or male sex. They only exist in relation to our ideas about binary assumptions about femininity/masculinity. The argument follows that female/male, feminine/masculine take on meaning within a specific historical context, society, and linguistic naming within that history/culture. This opens up the possibility for those ideas to be changed and deconstructed to allow for a different idea to emerge. For those pursuing a diversity politics through postmodern deconstructivist feminism, the preferred strategy is one of displacement of the hegemonic "norm" against which minoritized bodies have been defined. The goal is to deconstruct the discursive regimes that work to gender (race, disable, other, subjugate, colonize, etc.) subjects as a means of legitimating their exclusion from symbolic cultural positioning in normalcy, respectability, authority, and excellence. For example, Kristeva argues that femininity has no substantive content and is simply "that which is marginalized by the patriarchal symbolic order" (Kristeva, 1997, p. 248).

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9.5: Diversity Politics Through Reconstructivist Intersectional Feminisms

Intersectional Feminisms

As we have seen above, equality feminism and difference feminism sought to problematize the sex/gender distinction and the hegemonic logic that suggested that men were the standard to which women must evolve. Critiques from women on the margins of feminist theory, feminist movements, and legal court proceedings sought to problematize the raced and classed assumptions that implicitly positioned middle-class white women as the standard for all women, all the while mobilizing around a supposedly shared experience of womanhood. The assumed commonality of women's oppression and the assumed universality of women's experiences, as distinct from the commonly shared realities of man, were challenged in immigrant-receiving, colonial/white-settler societies such as Canada and the United States, where national experiences and minority nations and indigenous peoples were internally diverse even at the point of national founding.

Furthermore, the widespread adoption of multiculturalism and acknowledgements of women's diverse sexualities and disabilities further deconstructed the assumed "universality" of womanhood as a political and legal category around which to mobilize. Over the past 40 years, mainstream equality feminism and diversity feminisms were exposed for their own internal exclusions of women of various backgrounds, be they black/women of colour (hooks, 1981; Lorde, 1984; Abu-Laban, 1998; Razack, 1998), aboriginal women/indigenous feminists (Green, 2007; Monture-Angus; Two-Axe Early), Québécois feminists (de Sève, 2000, Lamoureux, 2000), queer and lesbian feminists (Butler, 2006; Majury, 1994; Rich, 1981), or women with disabilities (Peters, 1995; 2003) , to name just a few.

In practice, there are many different forms of intersectional feminisms. I will offer conceptual clarity about the necessary delineations between the postmodern deconstructivist feminism associated with Butler's thinking, which led to a rejection of the concept of 'women' as a political category around which to mobilize, and the kind of reconstructivist intersectional feminisms driving the projects of 'intersectional diversity politics' as a tactic for the intentional reconstruction of intersectionally diversified political-legal categories as the complex subject of many contemporary feminisms.

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9.6: Displacement Through Feminist Reconstruction of Diverse Legal Norms

Intersectionality

Emerging from a different strand of feminist thought grounded in the disciplinary thinking about anti-discrimination doctrine as it relates to legal rights enshrined in law, constitutionalism, and court precedents, rather than within political philosophy, feminist intersectional analysis or intersectional feminist strategies emerged from the dialogue between feminist legal theory, feminist critical race theory, and feminist law reform movements working to overturn narrow legal interpretations of diverse women's rights, notably in the United States and Canada. As coined by American scholar Kimberlé Crenshaw in her 1989 article "Demarginalizing the Intersection of Race and Sex: A Black Feminist Critique of Antidiscrimination Doctrine, Feminist Theory and Antiracist Politics," the term "intersectionality" was launched to give a name to the multiple intersections of women's exclusion. In the same year, in Looking White People in the Eye: Gender, Race, and Culture in Courtrooms and Classrooms, Canadian feminist critical race scholar Sherene Razack (1998) further problematized the logic of intersectionality with her concept of "interlocking systems of oppression" informing women's subjectivities and experiences of race, class, colonialism, mother tongue, sexual orientation, and/or disability (See also: Carastathis, 2008).

Within practitioner spaces, signaling the complex forms of marginalization and denigration of women, feminist legal and political theorists as well as feminist research and social justice movements (Canadian Research Institute for the Advancement of Women [CRIAW], 2006; Grillo, 1995) have continued to probe the concept of intersectionality over the last two decades. Sharing Canadian scholarly and practitioner applications of intersectionality in Japan for over two decades, I offer literacy tools in English and Japanese, as well as executive workshops on "Intersectional Thinking" for corporate and public policy leaders.

Postmodern (deconstructive) diversity feminism chose the rejection of the concept of "women" and all legal categories as monolithically oppressive. By contrast, intersectional reconstructivist feminisms opted for an explicit displacement of white, middle-upper-class women as the "norm" of feminist theory-activism, and a re-centring and reconstruction of diverse womxn's intersectional experiences of inequality as the political and legal category around which intersectional feminist organizes. Be it through feminist research methods, feminist institutionalism, feminist legal analysis and policy activism or feminist law reform movements, all have worked to realize an intersectional coalition politics in favour of democratic equality and freedom for diverse womxn and more recently, in explicit solidarity with diverse men as well.

Womxn (defined)

Womxn: a woman. A term used within intersectional feminism, as an alternative spelling to avoid the suggestion of sexism perceived in the sequences m-a-n and m-e-n, and to also signal the recognition of diverse gendered identities and the normative inclusion of trans-women and individual women who identify as nonbinary.

Through this contestation of diverse women's thought leadership and variants of democratizing feminist change agency, and with this robust competition of ideas seeking the realization of the promise of democratic equality for all women, the binary concept of sex/gender has been blown open, squarely displaced and then normatively reconstructed around the concept of intersectional privileges and oppressions/inequalities as the new "normative lens" through which to structure all citizen-subjects within the democratic community. This has made conceptual and discursive space for the necessary recognition of the complex diversities of all women's, men's and non-binary individualities and for the fuller range of experiences of complex inequality due to multiple, intersecting fault lines of historic power and oppression, liberty and disenfranchisement.

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9.7: Displacement Through Feminist Reconstruction of Diverse Parliaments

Displacing Oppressive Hierarchies

The tactic of displacement through feminist reconstruction of diverse parliaments has been led by diverse scholars and practitioner-activists who aim to displace and decentre the fictional abstract political representative underpinning modern representative democracy by forcing, through the use of various electoral gender quota designs for candidates and elected officials, new practices of power-sharing across gender, but also other pertinent fault lines of politicized identity generating social exclusion. Within the women/politics and gender/politics political science communities, some of these feminist scholars are best situated within an "equality politics" strategy that still aims primarily for the "inclusion of women in parliaments."

Others within these feminist political science and feminist practitioner communities are more disruptively working towards a "displacement strategy" that aims to overturn the symbolic political power and authority invested in hegemonic male/patriarchal "bodies," among other marginalized social groups, by legally forcing or voluntaristically nudging political parties towards a diversification of elected officials (Childs, 2016; Childs and Celis, 2020; Hughes, 2011; Mansbridge, 1999; Philips, 1993; Steele, 2006; Williams, 1998; Young, 2000). Depending on the technical build out, these electoral systems design s can ensure more egalitarian power-sharing and a sustainable performance of gender-balanced voice and seats held in parliament that will once and for all displace patriarchal practices of male homo social gatekeeping, clientelism, and nepotism (Bjarnegard, 2013). The idea is to see parliaments and representative institutions yield more diverse political leadership and thereby ensure more responsive legislation and policies that generate substantive equality and greater equity for an intersectionally diverse population.

While these legal and legislation-focused iterations of intersectional feminisms seek a displacement of oppressive hierarchies that structure the legal norms regulating public policy, and the symbolic legislators for the political community, the focus on law reform advocacy and the role of parliamentarians as lawmakers stops just shy of a full displacement of what our final variant sees as the problem, namely liberal individualism's impoverished reading of political liberty itself.

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9.8: Civic Republican Intersectional Feminism

Democratizing Intersectional Feminism

Through a cross-pollination of diversity feminisms, intersectional feminisms, and civic republican understandings of liberty and the role of law and representative democratic institutions this variant of feminist contestation aims to reconstruct the normative value of representative democracy itself (Steele, 2009; 2014a). In allegiance with the civic republican revival (Pettit, 1997; Pocock, 1975; Skinner, 1998; Viroli, 2002), this variant of democratizing intersectional feminism aims to recentre the very praxis of liberty as it is materially institutionalized through political representation as a public-facing, ethical speech-act of power-sharing. These speech-acts constitute and reconstitute the conditions of personal and public liberty of all intersectionally diverse corporealities sharing a fate of togetherness within the political community.

Our current practices of political and parliamentary representation are not in fact unleashing and supporting the ongoing work of self-determination for all peoples, nations, social groups, bodies, and corporealities. Rather, the anti-egalitarian power relations constitutive of pre-democratic status-based distinctions are still informally regulating the inner workings of who gains access to political representation. In Machiavellian terms, this ongoing "corruption" of our representative democratic institutions is what must be displaced, deconstructed, and then reconstructed using the democratizing power of the law and representative democratic institutions. In its place, we would seek the ethical and political legitimate, democratic reconstruction of personal and public liberty as a relational praxis and political good that is constituted in and through the very praxis of political power-sharing through collective and co-authoritative self-representation (Steele, 2009; 2014b).

End Goal

The end goal of this last iteration of a civic republican intersectional feminism is to displace the hyper-individualist reading of political liberty qua self-government as the aggregate output of abstract individuals devoid of any pre-democratic relational power differentials. Rather, by restoring and reconstructing a collectively-practiced concept and iteration of democratic liberty as a system of collective self-government and self-determination of all of the intersectional diversities constitutive of the population, the primary aim is to displace liberal individualism's reductive view of liberty as merely an "absence of government interference" (Pettit, 1997), and to restore the ethical power-distributing and power-sharing role of representative democratic institutions as the co-authoritative praxis dynamically constituting an intersectionally diverse yet co-equal citizenry. This reframes political representation and all representative institutions as the constitutive symbols of the collective freedom of the self-determining peoples, nations, social groups and individuals regulated by the democratic rules of the political community and who are structurally positioned under its jurisdiction of care.

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9.9: Displacement of Individualist Liberty Through Feminist Republican Reconstruction of Intersectional Political Liberty

Rejection of Hyper-Individualism

This Roman republican form of intersectional feminism proposes a rejection of the hyper-individualist liberal interpretation of liberty towards a holistic eco-system approach for designing a praxis of co-authoritative, and radically representative self-determination of and by an intersectionally diverse political community. In so doing, representative democratic institutions from local to national would be seen as the symbolic performative evidence of the ethos and praxis of democratic liberty and self-government. Distinct from most gender/politics scholars (Mansbridge, 1999; Mouffe, 1993, 2005; Philips, 1998; Williams, 1998; Young, 1998) who prefer the use of voluntary quotas, I argue in favour of legal power-sharing mechanisms as the proscriptive solution with democratic legitimacy to ethically institutionalize egalitarian power-sharing relations as a means of reconstructing an ethical use and praxis of personal and public liberty in service to the political community and its constituent parts (Steele, 2009; 2014b).

Breaking Up Corruption, Collusion, and Nepotistic Hegemonies

Grounded upon democratic foundations favouring the fair and equal access of all core stakeholder groups to contribute to the competition of ideas generating our public policies and our holistic rules of togetherness, I suggest that the rule of law can and must be used to intentionally break up the corruption, collusion, and nepotistic hegemonies that hold our public offices and our parliaments hostage to pre-democratic status-privileges. The use of intersectional, power-distributing legal quotas mechanisms is the democratic solution we have avoided, I suggest, due to liberal assumptions that political liberty was “present” if there was “less government interference” (Steele, 2009). This has left our most sacred political competitions largely unregulated by democratic law. Advocacy of this “deregulated space” has been defended by political party leaders who would prefer to retain complete and selfish license to choose not from the full intersectional diversity of human excellence and experience present within the population, but from the narrow and nepotistic social affinity groups who support the private agendas and partisan control of existing party elites over the levers governance.

This is an untenable position that Machiavelli would describe as “corrupt” because allowing “private interests” to take precedence over the ethical role of electoral offices being used in the service of public liberty, and therefore of parliamentary institutions being taken hostage in ways that prevents open and free competition of ideas sourced from all constituent and co-authoritative parts of the political community as co-equal and co-authoritative voices of liberty. Through intersectional feminist electoral systems designs, we can implement a legally-binding diversification strategy that intentionally displaces anti-democratic manifestations of informal social power that cannibalize the sanctity of our political parties and our parliamentary institutions. As the intermediaries of electoral democracy, this radical democratization of democratic institutions and of the political parties gatekeeping access to political representation as a site of public liberty would pave the way for a radically self-representative democratic politics.

Power-Sharing, Self-Advocacy, and Self-Representation

In its place, we would instead begin to see public performances of intersectional power-sharing, self-advocacy, and self-representation as a sacred practice of liberty that is both personal and publicly constituted. In the realization of this model of intersectional feminist republican liberty as self-government, the vigorous competition of ideas that animates elections every 4–5 years would no longer be exceptional. It would be the mere continuation of the robust and agonic competition of ideas animating all self-determining decision-making bodies and spaces across heterogeneous publics as a matter of general practice of relational, civic liberty. These very practices of co-authoritative self-determination would continue until the point at which the old anti-democratic norms will have lost all meaning against the reconstructive practices of substantive co-authority, co-equal voice, and political liberty invested anew in all types of diverse bodies, in all previously disenfranchised social groups, and all forms of corporeal liberty constitutive of the political community.

Diverse Corporealities

All types of diverse corporealities would be “normalized” as having ethical, legal, and moral standing as “the good representative” (Dovi, 2012) within such a political community. As a displacement politics that radically constitutes political equality through public practices of co-authoritative self-representation, this feminist republican reconstruction of relational political liberty would normalize power-sharing modalities of political representation as the regulated, democratic praxis of self-determination and public liberty. This praxis of relational and intersectional political liberty would become supported in all power-sharing modalities of self-representation, within all levels of electoral competition, from local to national, as well as within all heterogeneous publics and deliberative decision-making bodies. It would discursively and materially displace the purchase of liberal-individualist “liberty” by offering a democratically dynamic and substantively emancipatory process of de/reconstructive late modern representative democratic politics.

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9.10: Conclusion

Concluding Remarks

In the previous pages, I have mapped the contours of the evolution of multiple variants of feminisms, feminist political and legal philosophies, and what I invite us to think of and describe as the historic contributions of women's democratic thought leadership. While Squires' typological discussion of liberal feminism, radical feminism, and postmodern feminism offers the interpretative frames with which to make sense of the first core herstories of feminisms around 'equality politics', 'difference politics' and 'displacement politics', the last three decades in particular have seen a fourth and fifth variant of feminist thought leadership that moves beyond Butler's hyper-individualist view of the rule of law.

What I describe above as a current of reconstructivist intersectional feminisms have shown themselves to be productively investing in the democratic displacement of the universal, abstract citizen-subject in law and policy on the one hand, and in the democratic displacement of the universal, abstract elected representative as the authentic and ethical agent of collective self-government on the other. By virtue of these last two variants of contemporary feminisms, and through this updated typology, I propose to shed light on the different strategies of displacement working towards displacement of anti-democratic legal norms through legal battles and law reform, or that are working to diversify the "usual suspects" animating political parties and parliaments by innovating and advocating for electoral reforms that force greater power-sharing and diversification of our political representatives.

Finally, the last variant, of which I am an advocate, combines feminist intersectional electoral systems designs with critical democratic theory and philosophical engagement with forgotten forms of relational liberty, such as that defended from within republican revival. This latest variant aims for a more fundamental displacement of liberal-individualism's disempowering monopoly over the social imaginary of what might constitute a meaningful enjoyment of public liberty itself. It seeks a more ethical and emancipatory reconstruction of a deeply relational form of political liberty that might serve as the foundation of a radically representative democratic politics grounded upon power-sharing, co-authority and intersectional self-determination.

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- **Bodypolitik**: The diverse complexities of differences—such as sex, gender, race, indigeneity, and ability—that constitute the members of a political community.
- **Civic Republican Intersectional Feminism**: A variant of feminism that seeks to reconstruct representative democracy as a practice of relational liberty and power-sharing, displacing the hyper-individualism of liberal thought.
- **Difference Politics**: A political strategy that renounces gender neutrality to celebrate and re-value traits historically associated with women, such as nurturing and an "ethic of care," as a way to reverse patriarchal values.
- **Displacement**: A strategy aimed at deconstructing hegemonic norms and binaries (like male/female) to create space for counter-meanings and more diverse forms of human intelligibility.
- **Diversity Politics**: An approach within feminism that focuses on deconstructing traditional categories of analysis to move beyond the false dichotomies of modernist thinking.
- **Equality Politics**: A strategy aimed at the inclusion of women into existing political and social structures by asserting their equivalence to men as rational, autonomous individuals.
- **Gender Quotas**: Electoral system designs that legally force or encourage the diversification of elected officials to ensure power-sharing and dismantle patriarchal gatekeeping.
- **Intersectionality**: A framework coined by Kimberlé Crenshaw to identify the multiple, interlocking systems of oppression and exclusion (such as race, class, and gender) that shape an individual's experience.
- **Liberal Feminism**: A theoretical orientation that emphasizes formal equality and gender neutrality, seeking to prove that women are just as capable of rationality and independence as men.
- **Neoliberalism**: A political ideology grounded in the belief that the primary goal of democracy is to minimize government interference in the free market.
- **Postmodern Feminism (Deconstructivist)**: A strand of feminism that views gender as a political category constructed through discourse and power, often rejecting "women" as a stable or useful political category.
- **Reconstructivist Intersectional Feminism**: A contemporary variant that uses intersectionality to explicitly displace the white, middle-class woman as the "norm" and reconstruct political-legal categories around the diverse experiences of all womxn.
- **Relational Liberty**: A concept of democratic freedom viewed not as the absence of interference, but as a collective praxis of self-government and power-sharing among diverse citizens.
- **Womxn**: An alternative spelling used in intersectional feminism to avoid the linguistic inclusion of "man" and "men" and to signal the normative inclusion of trans-women and nonbinary individuals.

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9.13: Discussion Questions

1. Both "equality politics" (inclusion into existing structures) and "difference politics" (celebrating feminine traits) have been critiqued for failing to dismantle patriarchal structures. In what ways do these two approaches inadvertently "reinscribe" or "comfort" traditional gender hierarchies rather than achieving true democratic equality?

2. The text distinguishes between postmodern feminisms that reject the category of "women" as oppressive and "reconstructivist intersectional feminisms" that aim to rebuild political-legal categories. Why does the author argue that explicitly centering the diverse experiences of "womxn" is a more effective strategy for social transformation than abandoning these categories entirely?

3. Dr. Steele advocates for "relational liberty" as a collective practice of self-government rather than the liberal view of liberty as merely "the absence of government interference". How does this shift in perspective change our understanding of what it means for a political community to be "free" and "self-determining"?

4. The author argues for legally-binding intersectional quotas to "intentionally break up" nepotistic hegemonies in parliaments, rather than relying on voluntary "nudges". What are the democratic justifications for using the rule of law to regulate political competition in this way, and how does it address the issue of "private interests" holding public offices hostage?

5. The text proposes displacing the "abstract political representative" with "radically representative" leadership that reflects the full "bodypolitik". How would the "normalization" of diverse bodies in positions of power transform the performance of political representation from a partisan act into a "sacred practice of liberty"?

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10: ENVIRONMENTALISM

Introduction

In this chapter, we turn to one of the greatest crisis of our times, the climate crisis. First, we will look at green theory and what is means to put nature at the centre of analysis. Then, we will look into details at the climate change and its impact on human security. This section will look at various threats that come with climate change: economic, health, political and many others. Finally, it will be pondered what is the way forward.

This text explores the intersection of environmentalism, international relations theory, and human security in the context of a worsening global climate crisis. It contrasts traditional anthropocentric political models with green theory, an ecocentric approach that prioritizes nature's intrinsic value and suggests that ecological boundaries should supersede national borders. The sources highlight how human-driven environmental changes—such as rising sea levels and extreme heat—create severe multidimensional threats to community, economic, and food stability. Specific case studies, including the melting permafrost in Nunavut and water scarcity in Egypt, illustrate how these shifts jeopardize the safety of billions. Ultimately, the material advocates for a people-centered human security paradigm to address the urgent needs of climate refugees and vulnerable populations. Through this lens, the text argues that solving the current ecological emergency requires a fundamental transformation of human values and global governance.

Learning Objectives

- Explain the core principles of Green Theory, specifically the distinction between ecocentric (ecology-centered) and anthropocentric (human-centered) worldviews and the concept of the "tragedy of the commons" as it applies to the over-consumption of shared global resources.
- Analyze the impact of climate change through the lens of Human Security, identifying and describing the seven specific categories of threat to human well-being: economic, food-related, health, environmental, personal, community, and political.
- Contrast the Human Security paradigm with the traditional Realist approach to international relations, particularly in how they prioritize national interests versus the protection of the "vital core" of human lives and fundamental freedoms in the face of environmental crises.
- Evaluate the challenges of addressing global environmental issues within a system of sovereign states, considering why traditional concepts of sovereignty may be inadequate for solving transboundary problems and exploring alternative organizing principles like bioregionalism and decentralized governance.

10.1: Basics of Green Theory

10.2: Climate Crisis

10.3: Climate Change

10.4: Human Security

10.5: Community Threats

10.6: Economic Threats

10.7: Environmental Threats

10.8: Food Threats

10.9: Health Threats

10.10: Personal Threats

10.11: Political Threats

10.12: Conclusion

10.13: Glossary
10.14: References
10.15: Discussion Questions

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10.1: Basics of Green Theory

Environmentalism

In the 1960s there was public recognition of the global environmental crisis arising from the 'tragedy of the commons', which is the idea that as self-interested individuals, humans will overuse shared resources such as land, fresh water and fish. In the 1970s the first United Nations conference on the subject was held and by the 1980s green political parties and public policies had emerged. This coincided with a demand for a green theory to help explain and understand these political issues. By the 1990s, global politics had come to recognize the natural environment as an increasingly significant source of questions for the discipline, requiring theoretical as well as practical attention – especially in the wake of mounting evidence that human actions were significantly changing our global climate and presenting security problems as well as ecological ones.Ecological thought addresses the interests of nature itself rather than only the interests of humanity in nature. Green theory captures this orientation in political terms of value and agency (Goodin, 1992) – what is to be valued, by whom and how to get it. Green theory belongs to the critical theory tradition, in the sense that environmental issues evoke questions about relations between and among ourselves and others in the context of community and collective decision-making. In turn this has always raised the question of where the boundaries of political community are. For environmental problems, which transcend boundaries, these questions take the form of asking at what level of political community we should seek a solution. For green theorists, the answers are found in alternative ideas about political association based on our ecological relationships.

Typically, environmental issues are buried in political texts under other headings and with little acknowledgement of their unique theoretical significance. Environmentalism-themed scholarship is generally accepting of the existing framework of political, social and economic structures of world politics. While there are of course established forms of critical thought, these address relations within and between human communities, rather than human relations with the non-human environment. For example, liberalism emphasises individual rights of choice and consumption but is not fundamentally concerned with the environmental consequences of that consumption. Consequently, most forms of environmentalism seek to establish theoretical positions and practical solutions through existing structures, or in line with existing critiques of such structures. An environmentalist perspective, while identifying environmental change as an issue, attempts to find room for the environment among our existing categories of other concerns, rather than considering it to be definitional or transformational.

Political Ecology

Those frustrated by the lack of recognition of the environmental challenge in international relations turned to the interdisciplinary science of ecology. Political ecology has allowed both an ecological perspective to inform political thought and a political understanding of our environmental circumstances. In particular, our circumstances have long been determined by a particular developmental path that depends on the over-consumption of natural resources. Specifically, our political-economic practices of production, distribution and consumption are intended to meet our immediate human needs and desires. However, these practices are reflected in a growth-dependent global market economy that is not designed to achieve environmental sustainability or recognize ecological limits. This economy has provided material development of a kind, but with such uneven benefits and widespread collateral damage – including to the environment – that it has not provided human development in an ecological context. From an ecological perspective, there has been a general criticism of development and even apparently progressive sustainable development practices. The well-known model of the 'tragedy of the commons ' (Hardin, 1968), in which our short-term, individual, rational choices destroy our environmental resources, has thus been applied to the planet as a whole. It is tragic because we can see it coming but seem unable or unwilling to do anything about it. That inability is more than a practical problem; it is a profound theoretical challenge. Hardin pointed out that such issues cannot be solved by technical means, but require a change in human values.

Green Theory

Moving beyond environmentalism and political ecology, green theory more radically challenges existing political, social and economic structures. In particular, it challenges mainstream liberal political and economic assumptions, including those extending beyond the boundaries of existing political communities (or, what is conventionally knows as states). Goodin (1992) suggests that a distinguishing feature of green theory is its reference to a coherent moral vision – a "green theory of value" – which operates independently of a theory of practices or political agency. For example, a green morality might suggest that

human material development should be curtailed in the interest of preserving non-human nature. This would limit our freedom to consume however much we can acquire. The need to put some limits on traditional liberties suggests an approach that puts nature before people. Green theory, in this sense, is ecocentric.

Ecocentrism (ecology-centred thought) stands against anthropocentrism (human-centred thought). This is not because ecocentrism ignores human needs and desires, but rather because it includes those within a wider ecological perspective. Ecocentrism prioritises healthy ecosystems because they are a prerequisite to human health and wellbeing. In contrast, anthropocentrism sees only the short-term instrumental value of nature to humans. This ecocentric/anthropocentric distinction is at the heart of green theory. The holistic ecocentric perspective implies a rejection of the split between domestic and international politics, given that arbitrary boundaries between nations do not coincide with ecosystems. For example, air and water pollution can cross a border and climate change cuts across all borders and populations. Simply, human populations are ecologically interconnected. This impacts on how we understand and deal with transboundary and global environmental issues collectively, setting aside national self-interest.

The traditional concern with the state, in an international system of states, is a challenge to thinking about environmental issues. As a central feature of the historical Westphalian model of sovereign (self-determining) nation-states, the concept of sovereignty (ultimate authority) has been particularly troubling. Sovereignty neither describes the modern reality of political control nor offers a reliable basis for human identity or wellbeing. Global environmental problems require global solutions. This requires that we develop our understanding of the 'global' as an alternative organizing principle and perhaps look to green social movements rather than states for theoretical insights. This gives rise to the question of whether we need to give up on the idea of countries with borders as still being relevant to people's lives, or recast them in some more ecologically appropriate way with reference to how people live in relation to their environment. This will likely entail a more global than local kind of ethics. In part this hinges on our view of the need for political structures (big government, small government or no government) and the level or extent of their development. For example, we could promote centralized global political structures, such as an institution for governing environmental issues (Biermann, 2001), or allow a variety of decentralized, even anarchical, interconnected local structures to emerge as circumstances require (Dyer, 2014).

Decentralization, or the transfer of authority and decision-making from central to local bodies, has certain attractive features, such as self-determination and democratic accountability. Ecologically there seem to be advantages as well, since small communities may depend more on immediate local resources and so be more likely to care for their environment. Local communities are more likely to conceive of the natural environment and their relationship to it in less instrumental terms, viewing it more as their home, thus addressing one of the key reasons for the environmental crisis.

For example, the concept of 'bioregionalism', where human society is organized within ecological rather than political boundaries, raises intriguing issues of knowledge, science, history, culture, space and place in an ecological context (McGinnis, 1999). For instance, our sense of identity might derive more from familiar environmental surroundings than from the idea of nationality, such that we have greater inherited knowledge and understanding of our local environment than of our political location. However, there are also a number of objections to decentralisation, or greater localisation of decision-making. These include the concern that it would not promote cross-community cooperation as it is too parochial (too exclusively local), and this would mean little chance of developing effective mechanisms to deal with global problems. In effect, it might just reproduce a troublesome sovereign-state model of politics on a smaller scale.

Whether or not green theory can become central as an ideology for world politics remains to be seen, however, the climate crisis and its threats to human security cannot be ignored.

Attribution

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10.2: Climate Crisis

Magnitude of Crisis

In the long journey of human history, people have marveled at nature and depended upon it for survival. Yet, today, the ability of billions of citizens to live safe and healthy lives is increasingly threatened by climate change. Each year, millions of citizens helplessly watch as livelihoods based upon the environment such as fishing and farming are threatened. Climate change is a result of anthropogenic activity. Over 90% of the climate crisis is caused by human action, yet ironically this crisis can also be mitigated by human-generated solutions and innovations. Consider the fact that in 1000 AD the global population was a mere 295 million, 1 billion in 1800, 7.5 billion in 2021 and projected to reach 9.5 billion in 2050. Two factors are propelling climate change: the exponential increase in the global population and the accelerated effects of the Industrial Revolution. Today, 800 million people are without clean water in their home, village or community, and billions are impacted by the devastating human and environmental damages rendered by climate change. In addressing this phenomenon, theory provides an important foundation for understanding and cogent analysis.

As Voltaire aptly noted, it is important to define one's terms before embarking upon discourse. Accordingly, this chapter will provide a definition of climate change and address the United Nations Development Program landmark theory and paradigm, *Human Security*, as a strong analytical foundation for understanding climate change and the environment.

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10.3: Climate Change

Extreme Climate Change

Climate change is not a new phenomenon; it is an environmental reality that has affected human populations and the natural world for hundreds of thousands of years. What is new and troubling is the extreme rate of climate change and the fact that billions of global citizens are now affected by it. Island nations are sinking rapidly, sea level rise is forcing communities to migrate, extreme heat is turning arable land into desert, there are severe water shortages in India and northern China, and extreme weather events such as the Nok-Ten storm in Thailand that left 65 of the nation's 77 provinces declared disaster zones are becoming more frequent; these and other environmental events are among the impacts of climate change.

Indicators

According to the Intergovernmental Panel on Climate Change (IPCC), "There are many indicators of climate change. These include physical responses such as changes in the following: surface temperature, atmospheric water vapour, precipitation, severe events, glaciers, ocean and land ice, and sea level." (Cubasch & al., 2013).

One study noted the 'severe' climate impacts that are possible scenarios in the 21st century:

1. By 2040, the average global temperature could rise 2.6°C (4.7°F) above 1990 levels.
2. The global sea level could rise by 0.52 m (1.7 ft).
3. Water availability could decrease significantly in the most affected regions at lower altitudes (dry tropics and sub-tropics), thereby affecting 2 billion people.
4. Developing nations at lower altitudes will be affected most severely because of their climate sensitivity and low adaptive capacity. Industrialized nations to the north, meanwhile, will experience clear net harm and must divert greater proportions of their wealth to combat climate change at home. (Gulledge, 2008)

Impacts

A range of potentially destructive climate impacts have been described in scientific studies:

- "Hazard: The potential occurrence of a natural or human-induced physical event or trend or physical impact that may cause loss of life, injury, or other health impacts, as well as damage and loss to property, infrastructure, livelihoods, service provision, ecosystems and environmental resources.
- Exposure: The presence of people, livelihoods, species or ecosystems, environmental functions, services and resources, infrastructure, or economic, social, or cultural assets in places and settings that could be adversely affected.
- Vulnerability: The propensity or predisposition to be adversely affected. Vulnerability encompasses a variety of concepts and elements including sensitivity or susceptibility to harm and lack of capacity to cope and adapt.
- Impacts: Effects on natural and human systems. The impacts of climate change on geophysical systems, including floods, droughts and sea level rise, are a subset of impacts called physical impacts.
- Risk: The potential for consequences where something of value is at stake and where the outcome is uncertain, recognizing the diversity of values. Risk is often represented as probability of occurrence of hazardous events or trends multiplied by the impacts if these events or trends occur.
- Adaption: The process of adjustment to actual or expected climate and its effects. In human systems, adaption seeks to moderate or avoid harm or exploit beneficial opportunities.
- Resilience: The capacity of social, economic and environmental systems to cope with a hazardous event or trend or disturbance, responding or reorganizing in ways that maintain their essential function, identity and structure, while also maintaining the capacity for adaption, learning, and transformation." (IPCC, 2014).

Projections

Climate change projections for the 21st century are dramatic and irrefutable. Although variances will occur in terms of intensity in some regions, the general climate prognosis is certain with reference to weather extremes, sea level rise, rising heat levels,

desertification, ocean acidification, human health threats, damage to habitat and species extinction. Another alarming trend noted by the United Nations and other authoritative bodies is the huge projected rise in climate refugee populations that governments will largely be unprepared to control or mitigate. The U.N. has cited an estimate that there will be 200 million climate change refugees by 2050.

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10.4: Human Security

United Nations

In 1994, the United Nations Development Programme articulated a landmark theory or paradigm known as *Human Security* to provide the global community with a more progressive interpretation of human rights. Indeed, Human Security is described as 'people centered' and serves as a valid and needed contrast to realism, which is a dominant theory in international political discourse. Although realism has been a functional operating principle in international relations for centuries, it was popularized in recent years by the academic Hans Morgenthau in the well-known book *Politics Among Nations*. In this book, two central arguments are advanced: first, political leaders act according to the 'national interest' and, second, moral or human rights considerations cannot be applied to the actions of states. Accordingly, realism is often seen in Machiavellian terms as a doctrine of cold calculation and the harsh projection of national interests in the international community.

Human Security

The United Nations Commission on Human Security provides the following definition of human security: "to protect the vital core of all human lives in ways that enhance human freedoms and human fulfillment". Human security requires the protection of fundamental freedoms or freedoms that are essential to life. This includes protecting people from critical (severe) and pervasive (widespread) threats and situations (The United Nations Commission on Human Security, 2003). The human security doctrine provides clarity on the enumeration of human rights threats and the most urgent areas for action and identifies "seven specific threats to human security: economic, food-related, health, environmental, personal (including violence and abuse), community, and political." (The United Nations Development Programme, 1994).

According to United Nations officials, academics and human rights experts, human security is a people-centered approach to human development and protection. In sharp contrast to realism, which emphasizes national power and interests, human security seeks to embrace the individual and respond with humanism to the seven specific threats. Moreover, human security is also an activist theoretical approach that is a call to action for responsive and people-centered humanitarian policies. To address the monumental environmental challenges facing global citizens in the 21st century, valuable insights can be gained by examining these issues through the prism of human security.

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10.5: Community Threats

Climate Refugees

A massive threat to human rights and populations is the climate change-induced impact of climate change refugees. This is a problem that is increasing exponentially and will eventually overwhelm national governments and the U.N.'s capacity to respond. A stark example of *community threats* is the growing climate change refugee crisis. The United Nations 1951 Refugee Convention addressed the issue of political refugees and the problem of persecution. An IOM report noted that "migration can result from different environmental factors, among them gradual environmental degradation (including desertification, soil and coastal erosion) and natural disasters (such as earthquakes, floods or tropical storms)." (Laczko & Aghazarm, 2009). Climate change is dramatically increasing migration pressure. Indeed, associated extreme weather events resulting in drought, floods, and disease are projected to increase the number of sudden humanitarian crises and disasters in areas that are the least able to cope, such as those already mired in poverty or prone to conflict (United Nations Framework Convention on Climate Change, 2007: 5).

The 2015 Paris Agreement, which is designed to reduce global warming, set forth ambitious goals to forestall global warming and related climate change threats. Yet, many of the nations that signed the agreement have utterly failed to take action on the gravest humanitarian crisis to confront humanity in the 21st century, namely, climate change refugees. Indeed, many global experts estimate that the climate refugee population will far exceed projections rendered by the United Nations. Dr. Mehmood Ul-Hassan, head of Capacity Development at the World Agroforestry Center, stated that, "I foresee between 500 million and 1 billion climate refugees by 2050. The world isn't ready to tackle even fewer than 100 million due to current wars in the Middle East." (as quoted in Pink, 2018).

A human security perspective requires a global focus and humanitarian intervention to address the looming crisis. Moreover, when international regimes, such as the Paris Agreement, omit the refugee issue, it is a sign that the world community is still insufficiently addressing core human rights principles as defined in human security. A human security approach to the climate refugee issue would place the crisis at the forefront of the coordinated humanitarian policy of international regimes such as the United Nations and Paris Agreement signatories.

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10.6: Economic Threats

Nunavut

An example of an economic threat can be seen in the climate change threat facing the people of Nunavut in the Canadian Arctic region. Nunavut, which has a population 35,000, is an Inuit territory with a historic tradition and culture that is dominated by the environment and respect for nature. The reality of climate change is increasingly impacting the people of this Arctic region. The main threats are sea level rise and the resultant loss of permafrost due to global warming. Culture, community and traditional ways of life in Nunavut are increasingly threatened.

A report by the territorial government of Nunavut stated some of the pronounced climate change effects, which include: "Decreasing sea ice thickness and distribution, which is changing wildlife habitat and affecting and impacting hunters' ability to harvest wildlife; permafrost degradation, changes in ice conditions, rainfall and snow quantity, drainage patterns, temperatures, and extreme weather events can all have implications for existing infrastructure, such as roads and buildings, all of which was designed around a permanently frozen soil regime..." (Government of Nunavut, 2011).

Peter Taptuna, former premier of Nunavut, described some of the issues confronting Nunavut. "The government of Nunavut has been heavily involved in climate change and environmental protection. In November 2016, the government of Nunavut announced the creation of the Climate Change Secretariat, which is responsible for managing climate change adaptation and mitigation programs and policies for the government of Nunavut. Last year, we also worked with the World Wildlife Fund to host an Arctic Renewable Energy Summit. In addition, we stood with our fellow provinces and territories in signing the Pan-Canadian Framework for Clean Growth and Climate Change in December 2016. As part of this, we are now working with Canada towards introducing a made-in-Nunavut carbon pricing scheme that recognizes our territory's unique circumstances. We absolutely need Canada to help invest in clean technology and facilitate adaption and mitigation on multiple fronts, as we do not have the resources." (Pink, 2018).

From a human security perspective, the economic threat facing the people of Nunavut is severe. A community way of life is endangered, which will result in a loss of employment and income. Moreover, the building economy, which is based upon permafrost, will be threatened by unstable ground, a shifting terrain and billions of dollars in replacement costs for homes, schools, hospitals and businesses. Additional costs are associated with infrastructure reinforcement, and in many cases the replacement required will be substantial. These are costs that the small economy of Nunavut cannot realistically meet. Thus, it is imperative that a coordinated Canadian federal response in concert with multiple partners from business and civil society be launched in the coming years. The crisis facing Nunavut is both economic and cultural. A realist perspective would look at the situation in Nunavut as regrettable and unsustainable in terms of mitigation. The human security view, on the other hand, would focus upon a broader 'people-centered' approach that recognizes the economic threat and prioritizes a humanitarian response to protect Nunavut's culture and economy.

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10.7: Environmental Threats

Sea Level Rise

Human security is a modern paradigm that addresses current global crises such as environmental threats. One significant threat is sea level rise, which has been widely reported on in government, academic and scientific studies. Worldwide, there are approximately 800 million people living in large and small coastal communities who are directly threatened by sea level rise. The IPCC has projected sea level rise of one meter by 2100. Such a rise is sufficient to flood many communities and cities, threaten human life, damage property, disrupt infrastructure such as water pipes and bridges and force millions of citizens into migration internally or abroad.

A country that will be dramatically impacted by sea level rise is India, which has a shoreline of 7517 km. Large cities including Calcutta and Mumbai as well as hundreds of smaller communities are located on the coast. Mumbai has an average elevation of only 14m (46 feet). A study of 136 port cities showed that the population exposed to flooding linked with a 1-in-100-year event is likely to rise dramatically from 40 million currently to 150 million by 2070 (Nicholls, 2008). Mumbai, which is a highly populated city and home to numerous slums, is highly vulnerable to flooding. “The value of global assets exposed to flooding is estimated to rise to USD 35 trillion, up from USD 3 trillion today.” (The World Bank, 2010)

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10.8: Food Threats

Food Insecurity

Climate change-related food threats are associated with extreme heat, drought and desertification. As the global population increases from 7.5 billion in 2021 to a projected 9.5 billion in 2050, food security will become a prime global development concern. Food threats are recognized by the human security paradigm because the absence of a proper diet and nutrition can lead to a range of serious health and developmental challenges. Moreover, the victim is exposed to higher risk factors in general and related problems such as lower employment or school attendance. As noted by Sen in his brilliant treatise on capability deprivation, data on income levels do not fully capture the complete picture of a person's health, opportunities or living conditions.

Egypt is threatened by water scarcity, increasing drought, extreme heat and desertification. Consequently, the nation will be increasingly confronted by food insecurity. A study by the Egyptian Society for Migration Studies noted that, "the decline in agriculture activities due to temperature increases is expected to range from 10% to 60%. The production of the strategic crops will achieve significant reduction by the middle of the century (2050) as the following: Production of wheat will reduce by 18%; Production of rice will reduce by 11%; Production of maize will reduce by 19%. Egypt is among the high potential countries/regions for food crisis during the coming 40 years." (Hassan, 2013).

The United Nations, the Food and Agriculture Organization and numerous NGOs have already sounded dire warnings about the immense food security challenges confronting developing nations in the 21st century.

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10.9: Health Threats

Canada's First Nation Water Crisis

Canada is a top-15 economy in the world, it passed a Charter of Rights and Freedoms in 1982, it is a signatory to the United Nations Convention on the Rights of the Child of 1989, and it is a substantial contributor to United Nations' peacekeeping missions and refugee relief. Yet, with respect to First Nations communities in Canada, successive governments have been condemned by the United Nations and human rights observers for the deplorable living conditions on numerous First Nations reserves and the absence of water security and safe drinking water.

Human rights laws, no matter how nobly they are worded, are inadequate unless there is proper and verifiable enforcement. A devastating example of health threats under the human security paradigm is found in the water security crisis faced by multiple Canadian First Nations reserves. Specifically, one could posit that the Charter articles 7, life, liberty and the security of the person and 15, equality are violated in this context.

In October 2020, about 250 members of the Ontario Neskantaga First Nations were evacuated to Thunder Bay after oil and contaminants were detected in the water supply. High levels of hydrocarbons were also found in the water supply. The people in this community have been living under a boil water advisory for 26 years, the longest such advisory in Canadian history. Boiling water removes bacteria but not toxic metal from the water. In December 2020, the federal government released a statement announcing that 22 long-term boil water advisories would continue until at least March of 2021. This date was targeted by the Trudeau administration as the point at which boil water advisories would no longer be needed. The United Nations, of which Canada is a member, declared in a General Assembly in July 2010 resolution that water is recognized as a human right. Yet, Canada continues to fail First Nations' communities on one of the most pressing and urgent human rights, that of safe drinking water. Critics of the Canadian government note that the First Nations' water crisis is partially due to systemic discrimination and vestiges of an unequal and oppressive power structure in Canada. The human security paradigm would address this crisis in the context of the Canadian government's failure to provide a 'people-centered' approach to water security for First Nations citizens.

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10.10: Personal Threats

Water Scarcity

A recent study on the water supply in Jakarta noted that “Jakarta’s population includes a significant number that live in wretched, unsanitary conditions with no access to clean water services. In these conditions people are forced to choose either to draw water from heavily polluted rivers, contaminated and often saline aquifers, or when no mains water is available, purchase it from private pushcart vendors at the price of US 0.15 per 20-liter jerry can or US $7.50 per m3, which is more than 70 times the price of mains water if it were available.” (Fournier, Folliasson, Martin *et al*., 2013).

Water from the Jatiluhur Reservoir is not safe to consume, and its consumption has led to multiple incidents of waterborne disease. “The water flows through agricultural fields to reach Jakarta via a 33 km open canal. Along the way, some water is drawn illegally by farmers for irrigation use and water is also contaminated from people defecating into the canal and from rudimentary toilets that pour untreated waste into the canal. By the time the water reaches Jakarta, it is of poor quality.” (Ibid.)

One of the primary concerns among development experts and the United Nations is the commodification of water. All people are water-dependent irrespective of income. Yet, billions of global citizens are deprived of safe and adequate water consumption due to water-pricing schemes that are a violation of fundamental human rights. As climate change intensifies and the population in developing countries grows, the alarming rate of water insecurity will increase dramatically.

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10.11: Political Threats

Government Legitimacy

Climate change mitigation is beyond the financial scope of many developing countries. A global strategy for assistance and development must be expanded significantly and should involve the G20, United Nations, European Union, World Bank, Asia Development Bank and African Development Bank. There are multiple situations in which a government has seen the erosion of popular support and legitimacy due to corruption, (Venezuela), dictatorship (Myanmar), or massive human rights violations (Syria). In the case of climate change, there is a new phenomenon to consider, which is the loss of government legitimacy as a result of the failure to protect citizens from the harsh impacts of climate change. This new form of political illegitimacy and political 'threat' will become extreme in the coming decades. Governments in many cases will be financially unable to mitigate climate change impacts or be predictive in terms of climate change events. Examples include the rise in cases of malaria in Laos, the eroding coastlines in Bangladesh and water crises in India. Each crisis tests and threatens the political legitimacy of these countries' governments. Moreover, governments that have squandered public funds through corruption and mismanagement will be confronted by widespread protests and dysfunction when the severe impacts of climate change strike the population.

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10.12: Conclusion

Concluding Remarks

Human security has been embraced by responsive and progressive governments worldwide. It is a paradigm that has been upheld as a model of justice by the global human rights community, civil society and the United Nations. Human security offers hope for a beleaguered world. It is a model that great thinkers like Kant, who championed a noble world in his doctrine on cosmopolitanism, would eagerly pay homage to. As the global culture of human rights moves forward, it is within reason to conclude that in the 21st century, human security will replace realism as the global standard for national conduct and international development.

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- **Adaptation**: The process of adjustment to actual or expected climate and its effects. In human systems, it seeks to moderate or avoid harm or exploit beneficial opportunities.
- **Anthropocentric**: A human-centered worldview that prioritizes human needs and desires, often viewing nature only for its short-term instrumental value to humans.
- **Anthropogenic**: Resulting from human action. The source notes that over 90% of the current climate crisis is anthropogenic.
- **Bioregionalism**: A concept where human society is organized within ecological boundaries (such as familiar environmental surroundings) rather than arbitrary political or national borders.
- **Climate Change**: An environmental reality defined by physical indicators such as rising surface temperatures, sea level rise, extreme weather events, and changes in precipitation.
- **Climate Change Refugees**: Populations forced to migrate due to environmental factors, including gradual degradation (like desertification) or natural disasters (like floods and storms).
- **Decentralization**: The transfer of authority and decision-making from central governments to local bodies. This is often promoted in green theory to increase democratic accountability and local environmental care.
- **Ecocentric**: An ecology-centered worldview that prioritizes the health of ecosystems as a prerequisite for human well-being and includes human needs within a wider ecological perspective.
- **Exposure**: The presence of people, species, ecosystems, or assets in places and settings that could be adversely affected by climate events.
- **Green Theory**: A critical theory that prioritizes nature at the center of analysis, challenging existing political, social, and economic structures to address global ecological relationships.
- **Hazard**: The potential occurrence of a natural or human-induced physical event or trend that may cause loss of life, injury, or damage to property and ecosystems.
- **Human Security**: A "people-centered" paradigm that seeks to protect the "vital core" of human lives and fundamental freedoms from seven specific threats: economic, food, health, environmental, personal, community, and political.
- **Impacts**: The effects of climate change on geophysical, natural, and human systems.
- **Permafrost**: A permanently frozen soil regime. Its degradation due to global warming threatens infrastructure and traditional ways of life in Arctic regions like Nunavut.
- **Realism**: A dominant international relations theory that prioritizes national interests and power, often arguing that moral or human rights considerations cannot be applied to the actions of states.
- **Resilience**: The capacity of social, economic, and environmental systems to cope with a hazardous event or disturbance while maintaining their essential function and identity.
- **Risk**: The potential for consequences where something of value is at stake and the outcome is uncertain; often calculated as the probability of a hazard multiplied by its potential impact.
- **Sovereignty**: The concept of ultimate, self-determining authority within a nation-state. This traditional Westphalian model is often seen as a challenge to solving transboundary environmental problems.
- **Tragedy of the Commons**: The idea that self-interested individuals, acting rationally in the short term, will overuse and destroy shared resources such as fresh water, land, and fish.
- **Vulnerability**: The propensity or predisposition to be adversely affected, encompassing sensitivity to harm and a lack of capacity to cope or adapt.

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10.15: Discussion Questions

1. How does shifting from an anthropocentric (human-centered) to an ecocentric (ecology-centered) worldview fundamentally change how a society evaluates economic development and resource consumption?
2. In what ways is the current global climate crisis a "tragedy of the commons" on a planetary scale? Based on the sources, why can this problem not be solved by technical means alone, and what specific changes in human values might be required?
3. Contrast the "people-centered" Human Security paradigm with the traditional Realist approach to international relations. Which framework is better equipped to handle transboundary environmental issues like sea-level rise or cross-border pollution, and why?
4. With projections of climate refugees reaching between 200 million and 1 billion by 2050, should the 1951 Refugee Convention be amended to include those displaced by environmental factors? What are the moral and political implications if international agreements like the Paris Agreement continue to omit this issue?
5. Why is the traditional Westphalian model of sovereign nation-states often seen as a barrier to solving global environmental problems? Discuss the potential benefits and drawbacks of alternative organizing principles like bioregionalism or decentralized local governance in the context of ecological sustainability.

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11: CONCLUSION - IDEOLOGY IN THE GLOBALIZED FUTURE

Introduction

In this chapter, we are going to look at four important factors in the contemporary world to see what they may have to say about the future of ideologies and, by inference, the future of politics. Those factors are:

- A brief recap of ideology and its operationalization
- The central nature of the state in the international system
- The international system as currently comprised through globalization
- Other factors that might also apply: these factors may be endogenous (from within the system) or exogenous (from outside the system)

The general argument to be made is that ideology is developed and operationalized as a means of rhetorical power—that power is vested in its highest form of authority through the apparatus of the state. States are affected internally through domestic politics but, critically, also through the actions of other states and how they are constituted in the international system. There also exist at a global level some factors independent of states that also have the potential to greatly affect human affairs and therefore states, politics and ideology. By looking at all these elements, we can gather some understanding of how contemporary developments *may* affect ideological development in the future.

Prognostication is a mug's game, particularly in the world of human affairs. There are numerous variables – which social scientists like to define as specific factors that affect outcomes. Many of these variables are at best fuzzy and ill-defined and are often hard to grasp and even harder to measure. Even more difficult to grasp is how these variables interact with each other to determine outcomes. Is one variable dependent on, independent from, or co-dependent with other variables? To what extent does a variable affect or effect an outcome? In short, human affairs are quixotic, and we have a hard time pointing to any one cause for a particular outcome.

But this does not mean that looking at something analytically will not have explanatory or even predictive power. There are patterns and structures to human behaviour in the aggregate that allow us to examine with some confidence the broad picture of human affairs at a given time.

The astute reader will notice that the title of this chapter actually conflates two issues that can act separately as well as together to affect – and to effect – ideological development. These two issues are 'globalization' and 'the future.' What the title is asking of us, colloquially, is the most basic of human questions: "Where do we go from here?" And in looking at the trajectory of individuals and human institutions in the contemporary world, how people conceive and construct their current reality today rests on the interaction of local, national and international political structures.

Put another way, many of the big questions that face us today – including on ideology – revolve around the interconnectedness of the world and our agency within it. For example:

- How do we understand and handle climate change, which respects no national – or provincial – boundaries?
- (How) Do we regulate the flow of capital and goods around the world through investment, free trade, taxation, etc.? And how does this affect what we do domestically?
- (How) Do we handle the flow of labour (people) around the world?
- Can we establish international norms (standards and definitions) that countries will abide by based on common interpretations?

Exercise

Conduct a search of local media sources to find examples that write on the following:

- Which political parties and which geographical regions in Canada support or oppose implementing policies based on the belief that man-made climate change is real and an existential threat?
- Is it (more) important that India or Canada adhere to carbon emission limits?
- How should Canada react to an "America First" economic policy?

- What rules should Canada make on immigration and on refugees seeking residency?
- How should your country react to the situation of the Uighur people in China?

All these questions come with profound moral, social, and economic consequences. These consequences challenge our belief systems about what our state and/or nation is (and therefore who you, the reader, and me, the author, identify) while imposing a constrained reality on our material well-being that demands compromise, yet also provides hope and a vision for a resolved future.

These brief examples inform us that globalization and the future, like ideology itself, are conceptually nebulous. They include terms that are used in different contexts to mean different things all the time. Equally as important: they are weighed by each individual differently and inconsistently. Sometimes one thing is more important, sometimes another [see Moy on inconsistent voting patterns (Moy, 2008)]. So how can we consider all of this uncertainty and complexity and then try to assess how ideology will develop from this point on?

But as we stated above, concepts, even fuzzy concepts, can be approached methodologically in order to understand what aspects we are actually discussing. Or, as political scientists love to say, we can unpack these ideas.

These sources examine the complex future of political ideology within an increasingly interconnected global landscape. The text highlights how globalization, technological advancements, and environmental challenges are reshaping the way sovereign states and individual actors exercise power. By analyzing the transition from the Cold War's bipolar stability to a modern, multipolar system, the author explores how liberalism has evolved into neoliberalism and faced new domestic and international pressures. The provided chapters emphasize that while national governments remain central, they must now navigate a dense web of non-state influences and rapid information flows. Ultimately, the material seeks to unpack the variables that influence how societies construct their political realities and respond to global crises.

Learning Objectives

- Analyze the factors influencing the future of ideologies: Discuss how domestic politics, state actions, and systemic variables—such as technological revolutions and climate change—interact to shape ideological development.
- Assess the impact of globalization on worldviews: Evaluate how the increased interconnectedness of actors and political-economic structures affects contemporary political ideologies and individual belief systems.
- Evaluate the evolution of the international system: Examine the transition of the international order from the post-1945 bipolar era to the current complex web of interactions between state and non-state actors.
- Apply levels of analysis to political power: Utilize the "levels of analysis" framework (individual, state, and international/systemic) to understand how power and ideology are operationalized in different political contexts.
- Critique the challenges to the liberal international order: Investigate the rise of illiberal state models, such as China, and the emergence of nationalist-populist movements in Western democracies to understand potential shifts away from traditional liberal-democratic norms.

11.1: Ideology

11.2: International System and Globalization

11.3: Levels of Analysis

11.4: International System, Sovereignty, and the State

11.5: The State

11.6: Globalization - The 4th Level

11.7: Ideology and the Trajectory of the International System

11.8: The Liberal International Order 1945-1991

11.9: The Evolution of Liberal Internationalism at Home and Abroad

11.10: Other Factors - Technological and Climate Change

11.11: Problematization of China - Case Study in Systemic Change

11.12: Conclusion
11.13: Glossary
11.14: References
11.15: Discussion Questions

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11.1: Ideology

Ideology Operationalized

We are going to take ideology itself as a given in this exploration. We have already explored in various chapters in this text the problems with identifying what an ideology is and examples of specific ideologies themselves. There always remains an element of "I can't define it exactly, but I know it when I see it" to all discussions on ideology. However, in general we can say that ideology is an admixture of political and socio-economic beliefs, values and symbolism that provides explanatory coherence: a focal lens through which people filter political narratives. Furthermore, we have seen that ideology is operationalized. This is to say, ideology is used to accrue and wield power in politics along a continuum from rhetoric and persuasion through to physical force and violence.

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11.2: International System and Globalization

Globalization

One of the primary characteristics of the contemporary world is 'globalization.' But what does this mean? At its most basic, the term globalization summarizes a situation in which there exists a much greater interconnectedness of actors and political-economic structures around the world and also that these connections are much more immediate in transmission and in effect. Given this, how would these elements affect developments regarding ideology?

To understand how power, and therefore ideology, is operationalized within the international system and with globalization, we need to start first with the levels of analysis issue, which defines the basic parameters of the international system.

Exercise

Look up definitions of globalization in different available disciplinary scholarly reference works: political science, economics, sociology, communications.

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11.3: Levels of Analysis

Levels of Analysis Described

The levels of analysis issue in international relations theory hypothesises that power is exercised at three basic levels: the individual (or sub-state, or group) level, the state level, and the international level. At the sub-state level of analysis, political actors can be individuals exercising their own interests, or they can be an aggregate of people via an institutional arrangement or mechanism: for example, as political leaders, as voters, as municipalities, as provinces, or as interest groups. At the state level of analysis, we look at states as unitary actors exercising state self-interests. At the international – or systemic level – we talk of the interaction between states and the structure of the system as a whole.

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11.4: International System, Sovereignty, and the State

International Relations

The defining aspects of the international system are predicated on the relationship between states: literally inter-national. States remain the highest order of sovereign agency – the largest autonomous aggregate unit of human activity – in political affairs. It is states that make and enforce laws. In a simple example: the laws of the United States do not apply in Canada, nor vice versa. For American law to apply in Canada, Canada would have to pass a law recognizing the application of American law, thereby making it Canadian law.

The power of this absolute norm can be seen in the equality of status, inviolability, and independence given to such disparate entities as Luxembourg, the United States, Togo, or India. Iceland, an island country of 350,000 people – the size of London Ontario – with a GDP of $24 billion, is the sovereign equal of Japan, an island country of 126 million people and a GDP of $5 trillion (World Bank, 2021).

Critically for international relations, it is the state that filters all activities on the international stage. This means that the structures of internationalization, and therefore of globalization, rest directly or indirectly on agreements between states and/or on what is required to cross state boundaries. A few examples can quickly illustrate this:

- International law comprises agreements between states – treaties – that rely on states to enforce them within their jurisdictions.
- Multinational corporations must abide by the domestic laws of countries within which they operate.
- Social media are subject to domestic censorship and regulation.

States retain the ultimate power of sovereignty regardless of international norms or treaties: the ability to wage war, to invade, to blockade, to define laws and rights and to tax (or to refute international levies).

Exercise

- Look up examples on regulation or censorship of social media from around the world
- Compare the status of nations that are not states to those that are: How comparatively autonomous are Tibet, Palestine, Greenland, or perhaps more interestingly – Taiwan? In Canada, what is the autonomy and jurisdiction of Quebec – a province that claims nationhood – compared to a treaty First Nation?

Sovereignty, Cooperation, and International System

But there are limits to sovereignty. And there are different expressions of sovereignty. Individual states, even the most powerful, do not get everything their own way based on raw power, size or military force. States that isolate themselves entirely from abroad are most likely to suffer, perhaps even to the point of collapse.

Nor is the world simply an anarchic and brutal competition between states jostling for dominance. States can, and obviously do, come together cooperatively to further mutual goals. These can range from basic protection and cooperation on borders and boundaries to deep collaboration for the improvement of citizen well-being. And, of course, states also collaborate to further shared ideas or goals, things that might include ideologies, concepts and worldviews. At one end of the continuum rests isolationist states such as North Korea and on the other the deep collaboration and mutual integration of the European Union.

This discussion also informs us that the state and the international system define each other: states create the international system, and the international system imposes limitations, order and boundaries on states. A state itself is only a state in the fullest sense when it is recognized by other states in our international system. Therefore, a change in one affects a change in the other. This is something to bear in mind as we look at the state itself.

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11.5: The State

The State

If we drop down to the level of the state, things suddenly look very different. There is no longer a unitary actor speaking with a single voice. Instead, we tend to discuss the state as a set of institutions and interests that come together to create policy. So, where in the international setting we tend to say states have interests, at the domestic level we tend to discuss the various interests that go into forming foreign policy. Considering this, what counts as the state suddenly becomes problematic.

For example: Are the German Chancellor's interests and Germany's interests the same thing? One would say obviously not, but then to what extent does German policy reflect the Chancellor's interests? Which priorities, issues or outcomes are determined by the preferences of the current political leadership, and which are defined more by Germany's long-standing relationships and geopolitical position? How does the situation of the German Chancellor compare with, say, that of the Brazilian president?

We can see then that the form and structure of the state is important in predicting and predicating policy. How does power flow, and how is it exercised? What type of legal system does a state have? Is it unitary or federal? Is it democratic or authoritarian? Is it a constitutional state or a charismatic one? And, of course, how (much) does the ideological positioning of the leadership affect political developments.

Exercise

- Examine the role of the president and the US Congress in the making of American foreign policy.
- Look at a federal state (for example, India, Germany, Switzerland, Australia, The United States, Belgium) and see what jurisdictions its provinces or states are responsible for.

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11.6: Globalization - The 4th Level

Non-State Actors

So far, we have examined the international system in terms of levels, and these levels have centred on the fact of the state. However, there are obviously many other actors on today's global stage: international organizations, non-governmental organizations (NGOs), multi-national corporations, epistemic communities (knowledge-based networks that can be formal or informal), religious organizations, various forms of media, and many others, all of which have a huge influence on globalization and the international system. In addition to actors, there are also widely understood norms, such as human rights, norms on property, contracts, capitalism for economic affairs, and even the common use of English as a diplomatic language. These actors and norms also exercise boundaries and exert influence on state behaviour.

And because the international system is codified through states, these actors and norms also exist and operate at the state and sub-state levels of analysis. An example that quickly comes to mind is the multinational corporation: it exists as a sub-state actor in more than one state and yet it has a coherent interest that transcends national boundaries. Multinationals deal with municipalities to site and operate locally, they lobby national governments on issues in their jurisdiction, and they try to impact policy at the international level through international fora through influencing state foreign policy interests. Other non-state actors such as issue-based non-governmental organizations or religious organizations operate similarly.

There are other less evident non-state actors who exercise power differently, such as epistemic communities (knowledge-based communities). These are groups that range from scientists engaged in common collaboration to formal, large professional organizations that set international standards for their membership and/or activities.

What we see then, rather than three discrete levels of analysis, each with its own actors within them, is a complex web of interactions between and across these analytical levels. These interactions are between actors that look and behave differently at each level.

The density of this web of interactions, the numerous agents and outcomes that operate within it, and the outcomes they produce, comprise the true measure of the intensity and effects of globalization. With this analytical toolkit we can start to look at how ideology is operationalized in the international system and how it may develop from this point forward.

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11.7: Ideology and the Trajectory of the International System

End of History

In 1991, after the collapse of the Soviet Union, a widely read and influential article was published called “The End of History” (Fukuyama, 1989). It asserted that the Soviet collapse affirmed the ‘victory’ of 400 years of liberalism in the face of ideological challengers. It was not that history – the cause of events – was over, but rather the permanent entrenchment of liberalism as the end point in the history of political ideology was proven. The ideals of the Enlightenment had triumphed. American and allied foreign policy could focus on what would be the inevitable “democratization” and ‘normalization’ of former and current authoritarian states, notably those of Eastern Europe and Russia. Those that were not yet democratic ultimately would be. The era of ideological challenges was *de facto* over.

Not So Fast

Fast-forward to 2021 and things look very different. America faces a new challenge to its dominant world position: China. Russia remains an authoritarian, disruptive and powerful military state. At home, consensus on the nature and meaning of American democracy seems polarized, perhaps paralyzed, by the politics of Donald Trump. The European Union, a bastion of liberal democratic cooperation and economic integration, has lost Britain to nationalist-xenophobic political sentiment and faces similar challenges in Poland and Hungary.

So, what happened? By looking at the trajectory of international affairs from 1945 to the present, we can identify some systemic elements that provide some answers and may give clues to future developments.

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11.8: The Liberal International Order 1945-1991

Liberal Internationalism

The international system we currently occupy was founded in 1945. The dominant military, economic and cultural power was (and remains) the United States. The principles and institutions of this system were laid out in the Atlantic Charter of 1941 in response to German and Japanese war aims and were further refined and developed as an antithesis to the Axis Powers and to the causes of WWI that culminated in 1945 in the codification of norms and principles established through international treaties and institutions. The key institutions were the United Nations and the economic institutions of the Bretton-Woods Agreement: The World Bank and the IMF. Economic relations were further codified in 1947 through the GATT (now the WTO). This was a triumph of what came to be called liberal internationalism and reflected the international projection of liberalism and capitalism through American power.

America arranged the world militarily through a series of mutual defence military treaties: NATO being the primary trans-Atlantic alliance of the core Western powers. Its economic arrangements through the Bretton-Woods institutions entrenched American-preferred rules for trade, investment and foreign aid, all of which was backstopped by American funding. America had created a hegemony.

Cold War

However, challenging American dominance was the Soviet Union, whose political worldview was antithetical to America's, being based on Bolshevism – a specific interpretation of Communism based on Russia's global position. The Soviet Union was militarily and economically weaker than America. The Soviet Union's participation was defensive: it wanted stability and a post-war bargain that would legitimize its position as a great power – an equal to the major capitalist states. It was exhausted and depleted from the war against Germany in a way the Western powers were not. It needed to consolidate its hold on the buffer states of Eastern Europe it occupied. It needed to rebuild its economy and society: The Soviet Union had been invaded and occupied, while America had not. The second most powerful military state in the world, the Soviet Union, acceded to the post-war order from a position of weakness vis-à-vis America.

The final factor in the Cold War was the development of nuclear weapons and rockets to deliver them across the world. With these new weapons, any military conflict had the potential to become an extinction event for humanity. This very literal existential threat focused more importance on the use of international institutions to ensure diplomatic solutions on core disputes, however frosty and terse that diplomacy might be.

This bipolar system therefore comprised two states on which international stability ultimately relied. But they were exceptionalist, revolutionary states. Each was founded on a revolutionary myth married overtly to an ideology. These ideologies developed from the Enlightenment and the subsequent history of Western thought: Liberalism and Communism. Both ideologies came with a teleology culminating in their being the end state of political development, and these end states were linked to providing very different visions of freedom, individual happiness, and peace. They were inimically hostile. Communication, the flow of ideas, trade: all interactions between the two superpowers were minimal and closely directed by the state.

Conflict therefore shifted to other expressions of power that mainly fell to the ideological realm. The Cold War increasingly became a propaganda war in which the stakes were whether Communism (as interpreted by the Soviet Union) or liberal capitalism (as primarily interpreted by the United States) better expressed people's basic rights and material wants. The forms of the state become contestable grounds for definitions of things such as freedom, democracy, human rights, wealth, health and well-being, property, and economic and technological progress. The targets for ideological influence were mainly the former colonies of the now dissolved empires of Europe in Africa, Asia and Latin America. The international system was locked between two superpowers, with contestation only at the margins in places unfortunate to be the sites of devastating proxy wars in a tragic global game of chess.

Exercise

1. Compare and contrast Soviet and American definitions of rights.
2. Consider the nature of regimes propped up by American and Soviet military power. Did they violate international norms? Did

they pass the test in ‘proving’ their ideologies?

- Possible examples for the United States include but are not limited to, interventions in Guatemala, Vietnam, Chile, Nicaragua, Grenada.
- Possible examples for the Soviet Union include but are not limited to, interventions in: Angola, Hungary, Czechoslovakia, Afghanistan, Cuba.

Soviet Union's Demise

Quite rapidly, between 1989 and 1991, the Soviet Union and its allied Soviet regimes collapsed. The reasons were multifold but can be crudely summarized as a failed legitimacy of the Soviet state to be a sufficient economic and societal alternative to liberal capitalism, in combination with the increasing costs of military and economic competition with America. This collapse – the ‘End of History’ moment, indicated that the international system had changed. But had it?

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11.9: The Evolution of Liberal Internationalism at Home and Abroad

Liberal Internationalism

If we look at the elements of the international system from 1945 to today, we can see that the superficial structural rigidity of the Cold War masked other more substantive changes happening in the international system. And we can also see that today, most of the elements of the 1945 post-war settlement remain in place and may be even more robustly developed. We can also see that these changes have had profound consequences for how we view 'liberalism'.

Economic Growth

First, we can see that economic growth has become the key measure of power and success in competition between states. Military power is still vital but less exercisable, and it is seen as dependent on economic growth. The third factor to look at is the growing change, and rate of change, in interdependence and economic power. This was facilitated in large part by the deregulation of capital and currency flows since the 1970s. This deregulation was itself largely caused by the needs of the United States to sell bonds to fund Cold War armaments and proxy wars. By the 1990s, industrial production for the core western economies was increasingly shipped abroad, with only the administrative and design elements remaining at home. Corporations had moved production 'off-shore' in order to cut labour costs. To further economic competitiveness, large-scale free trade deals were negotiated to allow products to more easily ship back and forth across national boundaries, with NAFTA being the signature free trade deal for Canada.

For the international system, the key point on these deals is that while capital flowed freely, labour remained constrained to national boundaries. While foreign corporations were given equality status in law and access, individual rights and privileges were not. This resulted in the loss of jobs and industrial production in core western economies. And while it increased general wealth in recipient countries, it did not necessarily translate to a greater share of intellectual property by countries outside the core Western states. Nor for that matter did it automatically promote liberal-democratic values.

Rise of Non-State Economic Actors

Second, this economic growth has ironically undermined the power of the western political liberal democracy. The wealth and growth of non-state economic actors has come to hold huge sway on domestic political calculations and to influence domestic and sub-state policies.

Rise of Neoliberalism

Third, the nature of liberalism has changed. There have been internal changes in the belief systems and consequently the normative practices – the ideologies – of key western states. Shrinking the role of the state became acceptable grounds for political contestation based on a mix of ideas now commonly referred to as 'neoliberalism' – a variant of classical liberalism defined by smaller government, less taxation, deregulation, and greater individual choice. These things have all been equated to liberty – above all economic liberty – in the face of an oppressive state. These ideas were developed in reaction to Soviet communism and to the growth of the liberal-welfare state in the West through the Great Depression, the Second World War, and the Cold War itself. Reducing the narrative of liberty and rights to the narrower scope of individual freedom and ownership of property in the face of an overarching, bureaucratic government won political victories for Margaret Thatcher and Ronald Reagan in the 1970s and 1980s. It has set the parameters for political discourse in the United States and consequently for many other Western states ever since.

The combination of a reframed liberalism based on individual wants and rights, along with an increasing number of claims on the state's role in society, led over time to a much more polarized, fractious political climate in western liberal democracies. Prioritization among competing interests has become more difficult. Partisanship and the overt use of majoritarian political power has become a more frequent phenomenon.

New Constellation

These three factors have combined to create a new constellation of actors and institutions based on the principles of the post-war settlement. The core organizations remain, but increasingly other transnational and international organizations have created other channels to increase the dense web of international, multilateral organizations such as the EU, TPP, NAFTA, and G7.

Within the state, the combination of a reframed liberalism based on individual wants and rights, along with an increasing number of claims on the state's role in society, has led over time to a much more polarized, fractious political climate in western liberal democracies. Prioritization among competing interests has become more difficult. Partisanship, and with it the overt use of majoritarian political power to consolidate systemic partisan advantage, has become a more frequent phenomenon. The influence of wealthy interests in domestic political affairs – lobbying and spending in political contests – has become if not greater, then more overt.

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11.10: Other Factors - Technological and Climate Change

Technology

Finally, two other systemic factors have been introduced into the system. They were created in large part by the post-war order – changes arising out of the nature of the system itself – and have now become new and increasingly influential factors in international affairs and in the role and nature of the state at home and abroad: information technology and climate change.

The information revolution has turned out to be no less significant in overturning the course of human affairs than the Industrial Revolution that preceded it some 150 years previous. Like the Industrial Revolution, the IT revolution has fundamentally transformed not only the fundamentals of economic and social interaction but also accelerated the pace of that change. Most of the backbone of the contemporary economy and society did not exist 30 years ago: the internet, social media, artificial intelligence and machine learning, and robotics. All these things arose from the military and economic competition of the Cold War, much of it directly from military research and development. But it was the spread and development of IT for civilian applications that truly transformed the international system by changing the relationship between the state and sub-state actors and by transcending the state as the gatekeeper for sub-state actors in the international system.

Domestically, computational power and robotics transformed the nature of work and the mainstays of the economy. Industrial jobs were displaced by digital ones. Services (including such things as industrial design, software development, sales, entertainment, banking, insurance, marketing, administration, logistics, and legal) became the dominant sectors in developed Western economies, while the production of consumer durables became the mainstay of developing economies. Financial capitalism overtook productive capitalism as the main generator of wealth. This exacerbated the already-problematic economic challenge facing states: that capital is free to move, whereas people are not, especially as people and property are the primary tax base – the revenue – of the contemporary state. Capital flight and hiding revenue have become significant challenges to the economic viability of the state.

Internationally, the growth of IT has challenged the modern state-system through its capacity to instantly connect people to create new communities of interest as well as to strengthen existing epistemic and other communities. We have seen, for example, the power of Facebook and Twitter to frame political debate and to aggregate opinions and influences in a way that defies national borders. What happens in one place can now have immediate effects somewhere else. Individuals and sub-state actors are no longer reliant on state-provided or traditional corporate media sources of information. Real-time videos of political events such as the Arab Spring, Israeli-Palestinian conflict, and coups and countercoups in Myanmar galvanize interest groups internationally to put pressure on their respective states to react. The message can no longer be as easily controlled at home or abroad.

Also, political leadership having immediate and unmediated access to millions of individuals facilitates their ability to talk directly to audiences, bypassing previously established mechanisms and norms of social and political control: the role of a trusted gatekeeper has been severely attenuated in the face of direct populism. This is the era of “fake news” and false equivalencies, where claims and counter claims are reduced to rhetorical volume over substance, where “do your own research” has challenged the role of the expert, and where emotional arguments hold as much sway as rational ones.

Finally, IT challenges our assumed worldviews though its ability to measure and create new patterns of understanding: big data. For political movements, the capability to inexpensively gather and process large amounts of data has greatly increased their ability to present evidence to back their arguments. Nor are they solely reliant on state-produced data (the collection and promulgation of data used to require a scale of labour only available to the largest organizations). It is becoming easier and easier to gather and present nuanced opinion polling or data on outcomes for marginalized groups and to feed this information into public policy discourse.

Data patterns sometimes create completely new understandings by connecting things that have never been connected before. This might be something as trivial and innocuous as a fashion trend, a cultural phenomenon, or a global following for a professional soccer club. But sometimes profound understandings of our globalized world also emerge. No better example of this exists than man-made climate change.

Quite simply, without the huge amount of data and computational power developed over the past, the overwhelming evidence that man-made climate change is happening, and that we can project it to be an existential threat in the near future, would not

be possible. The scale and complexity of the task would have precluded it. Furthermore, this evidence and theorization were furthered by international research and shared resources facilitated in a qualitatively and quantitatively different way than was previously possible. And finally, the ability to disseminate this information widely to individuals and non-state actors furthered the attention political leadership received on this matter – accentuating it as a national and international priority.

Climate Change

Climate change has gone from a niche area of study to the dominant organizing principle of state and international-systemic policy over the course of 20 years. The understanding that we need to change the underlying structures of human activity that are predicated on the Industrial Revolution now informs most decision making at the national and international level. In essence, the creation and advancement of an equally new "green" ideology is underway.

Systemically, climate change has added a new layer of multinational, institutional, inter-state cooperation to the existing international system that is codified and underpinned by the UN-sponsored Paris Accords. This new layer of cooperation and understanding has reinforced the international-institutional state-system. Enforcing the mechanisms needed to deal with climate change requires individual sovereign states to enact climate change solutions, often at the expense of economic competitiveness or key sectors and interests in their own economy. So, while this is individually a challenge for many states, it is collectively the means by which states reclaim power and leadership from non-state and sub-state actors in the international system.

Changing Balance of Power

The final point to recognize about the IT revolution is that the enormous amounts of data readily available from the information systems people use also provide the capacity to target very precise points of information, be they geographical or various other criteria. Cross-matching multiple data sets makes it even more possible to focus in on very precise data, even identifiable individuals, anonymized or not. This has changed the balance of power not only between the individual and the state, but also of the individual with regard to non-state actors: insurance and finance companies, medical corporations, and political interest groups. The very nature of what it means to be an individual in society and the boundaries of your person as an economic actor, a political actor or an actor in any other context, have been perforated. This can affect how people think in terms of their ideological orientation, perhaps shaping a shifting set of preferences depending on each contextualization, which would, ultimately, break down ideological cohesion on social and public choice issues.

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11.11: Problematization of China - Case Study in Systemic Change

China

In examining China in the international system, we can see how all of the above-discussed topics come together to show the trajectory of change in the international system. China is now the world's leading exporter and second largest importer. Its foreign aid and outward investment have grown significantly. Its economic growth has given it the capacity to increase its military and become more assertive in projecting its regional strategic and military interests. Nor does it shy away from using its economic power as leverage against other states.

As of 2021, the crude ranking of state power in the international system looks radically different than in 1945. The American share of global production has slipped from its historic 1945 high to a more normal, yet still dominant 24%: one country still produces one-quarter of the world's output. But China now accounts for 15% of global GDP. Japan is 6%, Germany 5%, and India 3.25%. Other newcomers include South Korea, Indonesia and Brazil, which all have approximately the same GDP as Canada at just over 2%. Russia's economy now accounts for just under 2% of global GDP. More importantly, these numbers are based in large part on intra-industry trade: flows of production and services within the same corporation, but across national boundaries, for example, the integrated supply chain of auto parts and vehicle production between Canada and the United States. In 2014, 60% of US trade and 60% of European trade was intra-industry trade (Bureau of Economic Analysis, 2021).

Note that the projection of raw force has completely disappeared. While harder to gauge than economic power, the more traditional ranking of military power lists the top military powers in order as: United States, Russia, China, India, Japan, and South Korea. In terms of military spending, it is: United States, China, India, Russia, and United Kingdom. But with an expenditure of $778 billion, the United States easily surpasses the military spending of the next six countries combined (Stockholm International Peace Research Institute, 2021). The US remain the only military superpower.

What this says is that compared to 1945, or even 1991, the balance of power – of influence – in the international system has become more complex and has shifted to a global spread rather than being North-Atlantic based. And while the US faces no global military threat, it faces rising regional powers, many of which are locked with it in economic interdependence. Most notably is China, which has shown the potential to become a challenger to America's global position.

Threat to Liberal Internationalism

And China presents a specific, disruptive threat to the ideology of liberal internationalism and America's reliance on liberalism to underpin its self-appointed moral leadership. The lesson from China is that democracy and capitalism are not mutually dependent. Far from it: China has succeeded as a nationalist, illiberal state. China has maintained strong state intervention and ownership in its economy; it has shown no compunction in violating what liberal democracies would call individual and property rights. The treatment of individuals and of ethnic minorities violate international agreements. The Chinese state has censored – in essence localized – social media platforms such as Facebook. It has created the world's largest and deepest surveillance apparatus in order to promote what it considers order and harmony. China has taken on the challenge of climate change seriously because it sees economic advantage as well as survival in addressing the challenge. So far, nothing about being "green' has subverted China's general success in state control and the direction of its society and economy. In short: within the current rules of international trade and state-based cooperation, China has directed a state-led economy to achieve national goals as set by authoritarian leadership.

Other states can look at China and see a model that allows them to reject political reforms while accepting economic and technological advances. As long as they present no existential threat to general systemic stability, they can participate in and benefit from international economic institutionalization while rejecting political liberalization as irrelevant or culturally inappropriate. So far, only states or actors that have threatened great power interests and international stability in very specific ways have been subject to attempts at 'regime-change': Iraq, Iran, North Korea, Afghanistan, and the quasi-state Islamic jihadi movements such as Al-Qaeda.

What this implies for other states is that nationalist and/or authoritarian development models are not only viable but successful development models. The implications – and they are at this point merely implications – for the global influence of political

liberalism are ominous. For developing countries, China overtly holds out its model, and its foreign assistance, to non-democratic states.

Trump and Brexit

Which leads us to the very recent examples of President Trump in the US and Brexit in the UK. As we have seen above, in western liberal-democratic states, job displacement, wealth inequality, stagnating incomes, and the erosion of government services have placed great strains on domestic politics. This discontent has been used by populist politicians to target external groups to blame for these overlapping crises. In America, we saw the rise of Trump and a reformulated Republican Party come to power through attacking 'corrupt elites' who game the system and send jobs away from America. While in power, Trump attacked immigrants and refugees, distanced America from its traditional treaty partners and imposed trade barriers and tariffs that violated international agreements. He also arbitrarily lent legitimacy to other states with 'strongman' political leaders that disrupted the norms of the international system: Russia, North Korea, and Brazil.

In Britain, it was UKIP (the UK Independence Party) and elements of the ruling Conservative Party that fanned the flames of anti-EU sentiment and xenophobia against EU workers in Britain to the same effect. Both parties, when in power, challenged and/or rewrote the democratic norms of governance to impose their political programs.

Critically, the obvious self-harm to these countries' international influence and their economic wealth did not seem to dent their support or their path towards ever-increasing populist-authoritarian policies. In the UK, even the prospect of national dissolution in the wake of Brexit has not decreased the popularity of the Conservative government.

Elsewhere, we see similar disturbing patterns in governments in Poland and Hungary. Nationalist-populist elements carry serious oppositional strength in many if not most European countries. Although it is far too soon to claim that this is happening, if leading states of the international-democratic order, including those that lay claim to the foundation of liberal-democracy itself, are prone to ideological disruption caused by the structure of the contemporary international system, what does this say about the inevitably of post-Enlightenment liberal democracy?

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11.12: Conclusion

Concluding Remarks

Examining the history of the past 70 years reveals that significant changes in the international system and changes in ideological influence have occurred. The general trajectory of the change has been away from a system of competition between two competing 19th-century ideologies based on the Industrial Revolution to one that has multiple loci of influence that are dependent on participation in a globalized economy and a greater awareness of shared concerns.

Paradoxically, the liberal international ideal of a rules-based, global, capitalist order has become, if anything, more greatly entrenched while at the same time the liberal political values on which it was predicated seem to have become more attenuated. That attenuation can be directly correlated with the relative decline of American power abroad and the decline in ideological homogeneity within core western states (notably again within the United States). Global political stability and trade – not democracy, nor military might – has become the most valued norm for the states-based system. Co-operation on existential threats, be they the escalation of regional conflicts or systemic threats like climate change, will only further the desire to maintain a sustainable order or states.

The current international system has the potential to long outlast the superpower that instituted it in 1945. This is a significant departure from the ideological underpinnings that formed the international system in 1945 and even from those proposed in 'The End of History' in 1991.

Absent any real threat to, or inability to manage, global international capitalism of some form or another, states will continue to derive legitimacy from the international system through their ability to effectively cooperate internationally to create wealth and the economic resources to support sovereignty and state and/or citizen ambitions. However, the exact character of the system will depend on the key states – the large powers – within the system. And to some extent it will depend on some non-state actors' abilities to affect state forms and decision making. The rise of illiberal ideologies, such as populist authoritarianism or state nationalism, as perceived solutions to intractable problems is not only likely but expected given that international cooperation seems to be effectively divorced from international liberalism. However, such ideologies as yet make no global claims to political domination or revolutionary systemic change; rather, ideological settlement for now seems to reside within the purview of the state.

Based on this trajectory then, a guessing person would say that ideological challenges to the globalized world order will remain secondary as long as it is in the vested interests of states and their key economic stakeholders.

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- **Bipolar System:** An international order, such as that seen during the Cold War, in which global stability relies primarily on the interactions and balance between two dominant superpower states.
- **Epistemic Communities:** Knowledge-based networks, ranging from informal groups of scientists to large formal professional organizations, that set international standards and exert influence on state behavior.
- **Globalization:** A state of increased and immediate interconnectedness between actors and political-economic structures worldwide, characterized by the rapid transmission of information and effects across borders.
- **Hegemony:** A condition of dominant leadership and influence within the international system, specifically referring to the post-1945 world order established and led by the United States.
- **Ideology:** An admixture of political and socio-economic beliefs, values, and symbols that serves as a "focal lens" for individuals to filter political narratives; it is "operationalized" as a tool to accrue and wield power.
- **International System (Systemic Level):** The level of analysis that examines the interactions between states and the structure of the global system as a whole.
- **Intra-industry Trade:** Economic flows involving production and services that occur within the same corporation but across national boundaries, creating integrated global supply chains.
- **Levels of Analysis:** A framework in international relations theory hypothesizing that power is exercised at three basic levels: the individual (sub-state), the state, and the international (systemic).
- **Liberal Internationalism:** An international order based on the projection of liberalism and capitalism, supported by American power and codified through treaties and institutions like the United Nations and the World Bank.
- **Neoliberalism:** A variant of classical liberalism that advocates for smaller government, less taxation, deregulation, and the prioritization of individual economic liberty.
- **Sovereignty:** The status of a state as the highest order of autonomous agency, possessing the ultimate power to define laws, tax, and filter all activities that cross its boundaries.
- **State (Domestic Level):** Rather than a unitary actor, the state at this level is viewed as a set of institutions and interests that compete and collaborate to form policy.
- **Variables:** Specific factors used by social scientists to define and measure elements that affect outcomes in human affairs.

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11.15: Discussion Questions

1. The source identifies states as the "highest order of sovereign agency," yet notes that globalization creates a "complex web" of interactions that often bypass state control. In an era where multinational corporations can move capital freely and information technology allows for unmediated global communication, to what extent do states truly retain their ultimate power of sovereignty?
2. Francis Fukuyama's 1989 "End of History" theory predicted the permanent triumph of liberal democracy. However, the source highlights China as a successful "nationalist, illiberal state" that has achieved economic growth without political liberalization. Does China's model prove that capitalism and democracy are not mutually dependent, and what does this imply for the future of liberal internationalism?
3. The information technology revolution has changed the relationship between the state and its citizens by removing the state's role as a "trusted gatekeeper" of information. How has the rise of "fake news," big data, and direct populism through social media affected the ability of individuals to form cohesive ideological worldviews?
4. The source suggests that the shift toward "neoliberalism"—prioritizing economic liberty, deregulation, and smaller government—has led to increased partisanship and job displacement in Western democracies. How has the "off-shoring" of industrial production and the resulting wealth inequality fueled the rise of populist movements like Trumpism and Brexit?
5. The conclusion states that the international system now values "global political stability and trade" over the promotion of democracy. If international cooperation is increasingly "divorced from international liberalism," what are the long-term consequences for global human rights and the survival of post-Enlightenment liberal values?

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INDEX

B

Bristol School
8: Multiculturalism

C

Canadian school
8: Multiculturalism
classical conservatism
4: Conservatism
conservatism
4: Conservatism

D

definitions of ideology
1: Introduction - Thinking about Political Ideologies
diversity
8: Multiculturalism

F

feminism
1: Introduction - Thinking about Political Ideologies
free markets
4: Conservatism

H

human equality
1: Introduction - Thinking about Political Ideologies

I

immigrant integration
8: Multiculturalism
individual rights
4: Conservatism

K

key thinkers
4: Conservatism

L

liberalism
1: Introduction - Thinking about Political Ideologies

M

Marxism
1: Introduction - Thinking about Political Ideologies
modern conservatism
4: Conservatism
multiculturalism
8: Multiculturalism

N

national identity
8: Multiculturalism

P

pluralism
1: Introduction - Thinking about Political Ideologies
political action
1: Introduction - Thinking about Political Ideologies
political ideologies
1: Introduction - Thinking about Political Ideologies
political ideology
4: Conservatism
political philosophy
4: Conservatism
public philosophy
8: Multiculturalism
public policy
8: Multiculturalism

S

social order
4: Conservatism
socialism
1: Introduction - Thinking about Political Ideologies
societal cultures
8: Multiculturalism

T

tradition
4: Conservatism

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GLOSSARY

S

Sample Word 1 | Sample Definition 1

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    - About the Author - *Undeclared*
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    - 1.4: How Ideologies Differ - *CC BY-NC 4.0*
    - 1.5: Left-Right Spectrum - *CC BY-NC 4.0*
    - 1.6: Ideologies That Don't Fit - *CC BY-NC 4.0*
    - 1.7: Left and Right in Canada - *CC BY-NC 4.0*
    - 1.8: Limits of the Left-Right Spectrum - *CC BY-NC 4.0*
    - 1.9: Ideologies are Dynamic - *CC BY-NC 4.0*
    - 1.10: Ideologies Impact Economics, Society, and Politics - *CC BY-NC 4.0*
    - 1.11: Glossary - *CC BY-NC 4.0*
    - 1.12: References - *CC BY-NC 4.0*
    - 1.13: Discussion Questions - *CC BY-NC 4.0*
  - 2: Indigenous Worldview - *Undeclared*
    - 2.1: What I learned from Coyote - *Undeclared*
    - 2.2: As I had shared with Coyote - *Undeclared*
    - 2.3: I hear a hushed voice - *Undeclared*
    - 2.4: In the first year - *Undeclared*
    - 2.5: The dream - *Undeclared*
    - 2.6: I rest my head - *Undeclared*
    - 2.7: I look around - *Undeclared*
    - 2.8: Conclusion - *Undeclared*
    - 2.9: Glossary - *Undeclared*
    - 2.10: References - *Undeclared*
    - 2.11: Discussion Questions - *Undeclared*
  - 3: Liberalism - *Undeclared*
    - 3.1: Liberalism and Modernity - *CC BY-NC 4.0*
    - 3.2: The Values of Liberalism - *CC BY-NC 4.0*
    - 3.3: Liberalism and its Variants - *CC BY-NC 4.0*
    - 3.4: Classical Liberalism - *CC BY-NC 4.0*
    - 3.5: Reform Liberalism - *CC BY-NC 4.0*
    - 3.6: Neoliberalism - *CC BY-NC 4.0*
    - 3.7: The Future of Liberalism - *CC BY-NC 4.0*
    - 3.8: Glossary - *CC BY-NC 4.0*
    - 3.9: References - *CC BY-NC 4.0*
    - 3.10: Discussion Questions - *CC BY-NC 4.0*
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    - 4.1: Classical Conservatism - *CC BY-NC 4.0*
    - 4.2: Modern Conservatism - *CC BY-NC 4.0*
    - 4.3: Libertarianism - *CC BY-NC 4.0*
    - 4.4: Neoconservatism - *CC BY-NC 4.0*
    - 4.5: Conservatism in the Future - *CC BY-NC 4.0*
    - 4.6: Glossary - *CC BY-NC 4.0*
    - 4.7: References - *CC BY-NC 4.0*
    - 4.8: Discussion Questions - *CC BY-NC 4.0*
  - 5: Socialism - *CC BY-NC 4.0*
    - 5.1: The Socialist Core - *Undeclared*
    - 5.2: The Diversity of Socialism - *Undeclared*
    - 5.3: Utopian Socialism - *Undeclared*
    - 5.4: Libertarian Socialism - *Undeclared*
    - 5.5: Communism - *Undeclared*
    - 5.6: Social Democracy - *Undeclared*
    - 5.7: Socialism Today - *Undeclared*
    - 5.8: Productivism vs. Environmentalism - *Undeclared*
    - 5.9: Globalization vs. Anti-Globalization - *Undeclared*
    - 5.10: Socialist Feminism - *Undeclared*
    - 5.11: Multicultural and Nationalist Issues -

Undeclared
- 5.12: Conclusion - *Undeclared*
- 5.13: Glossary - *Undeclared*
- 5.14: References - *Undeclared*
- 5.15: Discussion Questions - *Undeclared*

◦ 6: Nationalism - *CC BY-NC 4.0*
- 6.1: Modernist and Ethnosymbolic Theories - *Undeclared*
- 6.2: Shifting Focus From Sociohistorical and Macro-Sociological Perspectives to Meso and Microsociological Analyses - *Undeclared*
- 6.3: The Ethnic-Civic Opposition and Its Limitations - *Undeclared*
- 6.4: Contemporary Typologies - *Undeclared*
- 6.5: Types of Nationalism - The Case of Quebec - *Undeclared*
- 6.6: Nationalism in Time and Space - *Undeclared*
- 6.7: Conclusion - *Undeclared*
- 6.8: Glossary - *Undeclared*
- 6.9: References - *Undeclared*
- 6.10: Discussion Questions - *Undeclared*

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- 7.2: Variants of Populism - *Undeclared*
- 7.3: History of Populism - *Undeclared*
- 7.4: Populism in the Contemporary Era - *Undeclared*
- 7.5: Latin American Populism - *Undeclared*
- 7.6: European Populism - *Undeclared*
- 7.7: North American Populism - *Undeclared*
- 7.8: Asian and Australasian Populism - *Undeclared*
- 7.9: The Future of Populism - *Undeclared*
- 7.10: Glossary - *Undeclared*
- 7.11: References - *Undeclared*
- 7.12: Discussion Questions - *Undeclared*

◦ 8: Multiculturalism - *CC BY 4.0*
- 8.1: Main Schools of Thought - *CC BY 4.0*
- 8.2: The Canadian School - *CC BY 4.0*
- 8.3: The Bristol School - *CC BY 4.0*
- 8.4: Multiculturalism's Variants - *CC BY 4.0*
- 8.5: Official Multiculturalism - *CC BY 4.0*
- 8.6: Multiculturalism Policies - *CC BY 4.0*
- 8.7: Multiculturalism in Inhospitable Environments - *CC BY 4.0*
- 8.8: Multiculturalism's Near and Longer-Term Prospects - *CC BY 4.0*
- 8.9: Multiculturalism's Rivals - *CC BY 4.0*
- 8.10: A Shift in the Ideological Environment - *CC BY 4.0*
- 8.11: Conclusion- Multiculturalism's Limitations - *CC BY 4.0*
- 8.12: Glossary - *CC BY 4.0*
- 8.13: References - *CC BY 4.0*
- 8.14: Discussion Questions - *CC BY 4.0*

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- 9.2: Equality Politics Through Liberal Feminisms - *Undeclared*
- 9.3: Difference Politics Through Maternal/ Radical Feminisms - *Undeclared*
- 9.4: Diversity Politics Through Postmodern Feminisms - *Undeclared*
- 9.5: Diversity Politics Through Reconstructivist Intersectional Feminisms - *Undeclared*
- 9.6: Displacement Through Feminist Reconstruction of Diverse Legal Norms - *Undeclared*
- 9.7: Displacement Through Feminist Reconstruction of Diverse Parliaments - *Undeclared*
- 9.8: Civic Republican Intersectional Feminism - *Undeclared*
- 9.9: Displacement of Individualist Liberty Through Feminist Republican Reconstruction of Intersectional Political Liberty - *Undeclared*
- 9.10: Conclusion - *Undeclared*
- 9.11: Glossary - *Undeclared*
- 9.12: References - *Undeclared*
- 9.13: Discussion Questions - *Undeclared*

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- 10.1: Basics of Green Theory - *Undeclared*
- 10.2: Climate Crisis - *Undeclared*
- 10.3: Climate Change - *Undeclared*
- 10.4: Human Security - *Undeclared*
- 10.5: Community Threats - *Undeclared*
- 10.6: Economic Threats - *Undeclared*
- 10.7: Environmental Threats - *Undeclared*
- 10.8: Food Threats - *Undeclared*
- 10.9: Health Threats - *Undeclared*
- 10.10: Personal Threats - *Undeclared*
- 10.11: Political Threats - *Undeclared*
- 10.12: Conclusion - *Undeclared*
- 10.13: Glossary - *Undeclared*
- 10.14: References - *Undeclared*
- 10.15: Discussion Questions - *Undeclared*

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- 11.2: International System and Globalization - *Undeclared*
- 11.3: Levels of Analysis - *Undeclared*
- 11.4: International System, Sovereignty, and the State - *Undeclared*
- 11.5: The State - *Undeclared*
- 11.6: Globalization - The 4th Level - *Undeclared*
- 11.7: Ideology and the Trajectory of the International System - *Undeclared*
- 11.8: The Liberal International Order 1945-1991 - *Undeclared*
- 11.9: The Evolution of Liberal Internationalism at Home and Abroad - *Undeclared*
- 11.10: Other Factors - Technological and Climate Change - *Undeclared*
- 11.11: Problematization of China - Case Study in

Systemic Change - *Undeclared*
- 11.12: Conclusion - *Undeclared*
- 11.13: Glossary - *Undeclared*
- 11.14: References - *Undeclared*
- 11.15: Discussion Questions - *Undeclared*

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    - 1.6: Ideologies That Don't Fit - *CC BY-NC 4.0*
    - 1.7: Left and Right in Canada - *CC BY-NC 4.0*
    - 1.8: Limits of the Left-Right Spectrum - *CC BY-NC 4.0*
    - 1.9: Ideologies are Dynamic - *CC BY-NC 4.0*
    - 1.10: Ideologies Impact Economics, Society, and Politics - *CC BY-NC 4.0*
    - 1.11: Glossary - *CC BY-NC 4.0*
    - 1.12: References - *CC BY-NC 4.0*
    - 1.13: Discussion Questions - *CC BY-NC 4.0*
  - 2: Indigenous Worldview - *Undeclared*
    - 2.1: What I learned from Coyote - *Undeclared*
    - 2.2: As I had shared with Coyote - *Undeclared*
    - 2.3: I hear a hushed voice - *Undeclared*
    - 2.4: In the first year - *Undeclared*
    - 2.5: The dream - *Undeclared*
    - 2.6: I rest my head - *Undeclared*
    - 2.7: I look around - *Undeclared*
    - 2.8: Conclusion - *Undeclared*
    - 2.9: Glossary - *Undeclared*
    - 2.10: References - *Undeclared*
    - 2.11: Discussion Questions - *Undeclared*
  - 3: Liberalism - *Undeclared*
    - 3.1: Liberalism and Modernity - *CC BY-NC 4.0*
    - 3.2: The Values of Liberalism - *CC BY-NC 4.0*
    - 3.3: Liberalism and its Variants - *CC BY-NC 4.0*
    - 3.4: Classical Liberalism - *CC BY-NC 4.0*
    - 3.5: Reform Liberalism - *CC BY-NC 4.0*
    - 3.6: Neoliberalism - *CC BY-NC 4.0*
    - 3.7: The Future of Liberalism - *CC BY-NC 4.0*
    - 3.8: Glossary - *CC BY-NC 4.0*
    - 3.9: References - *CC BY-NC 4.0*
    - 3.10: Discussion Questions - *CC BY-NC 4.0*
  - 4: Conservatism - *CC BY-NC 4.0*
    - 4.1: Classical Conservatism - *CC BY-NC 4.0*
    - 4.2: Modern Conservatism - *CC BY-NC 4.0*
    - 4.3: Libertarianism - *CC BY-NC 4.0*
    - 4.4: Neoconservatism - *CC BY-NC 4.0*
    - 4.5: Conservatism in the Future - *CC BY-NC 4.0*
    - 4.6: Glossary - *CC BY-NC 4.0*
    - 4.7: References - *CC BY-NC 4.0*
    - 4.8: Discussion Questions - *CC BY-NC 4.0*
  - 5: Socialism - *CC BY-NC 4.0*
    - 5.1: The Socialist Core - *Undeclared*
    - 5.2: The Diversity of Socialism - *Undeclared*
    - 5.3: Utopian Socialism - *Undeclared*
    - 5.4: Libertarian Socialism - *Undeclared*
    - 5.5: Communism - *Undeclared*
    - 5.6: Social Democracy - *Undeclared*
    - 5.7: Socialism Today - *Undeclared*
    - 5.8: Productivism vs. Environmentalism - *Undeclared*
    - 5.9: Globalization vs. Anti-Globalization - *Undeclared*
    - 5.10: Socialist Feminism - *Undeclared*
    - 5.11: Multicultural and Nationalist Issues -

Undeclared
- 5.12: Conclusion - *Undeclared*
- 5.13: Glossary - *Undeclared*
- 5.14: References - *Undeclared*
- 5.15: Discussion Questions - *Undeclared*

◦ 6: Nationalism - *CC BY-NC 4.0*
- 6.1: Modernist and Ethnosymbolic Theories - *Undeclared*
- 6.2: Shifting Focus From Sociohistorical and Macro-Sociological Perspectives to Meso and Microsociological Analyses - *Undeclared*
- 6.3: The Ethnic-Civic Opposition and Its Limitations - *Undeclared*
- 6.4: Contemporary Typologies - *Undeclared*
- 6.5: Types of Nationalism - The Case of Quebec - *Undeclared*
- 6.6: Nationalism in Time and Space - *Undeclared*
- 6.7: Conclusion - *Undeclared*
- 6.8: Glossary - *Undeclared*
- 6.9: References - *Undeclared*
- 6.10: Discussion Questions - *Undeclared*

◦ 7: Populism - *CC BY-NC 4.0*
- 7.1: Core Concepts and Themes - *Undeclared*
- 7.2: Variants of Populism - *Undeclared*
- 7.3: History of Populism - *Undeclared*
- 7.4: Populism in the Contemporary Era - *Undeclared*
- 7.5: Latin American Populism - *Undeclared*
- 7.6: European Populism - *Undeclared*
- 7.7: North American Populism - *Undeclared*
- 7.8: Asian and Australasian Populism - *Undeclared*
- 7.9: The Future of Populism - *Undeclared*
- 7.10: Glossary - *Undeclared*
- 7.11: References - *Undeclared*
- 7.12: Discussion Questions - *Undeclared*

◦ 8: Multiculturalism - *CC BY 4.0*
- 8.1: Main Schools of Thought - *CC BY 4.0*
- 8.2: The Canadian School - *CC BY 4.0*
- 8.3: The Bristol School - *CC BY 4.0*
- 8.4: Multiculturalism's Variants - *CC BY 4.0*
- 8.5: Official Multiculturalism - *CC BY 4.0*
- 8.6: Multiculturalism Policies - *CC BY 4.0*
- 8.7: Multiculturalism in Inhospitable Environments - *CC BY 4.0*
- 8.8: Multiculturalism's Near and Longer-Term Prospects - *CC BY 4.0*
- 8.9: Multiculturalism's Rivals - *CC BY 4.0*
- 8.10: A Shift in the Ideological Environment - *CC BY 4.0*
- 8.11: Conclusion- Multiculturalism's Limitations - *CC BY 4.0*
- 8.12: Glossary - *CC BY 4.0*
- 8.13: References - *CC BY 4.0*
- 8.14: Discussion Questions - *CC BY 4.0*

◦ 9: Feminism - *CC BY-NC 4.0*
- 9.1: Typology of Feminisms - *Undeclared*
- 9.2: Equality Politics Through Liberal Feminisms - *Undeclared*
- 9.3: Difference Politics Through Maternal/ Radical Feminisms - *Undeclared*
- 9.4: Diversity Politics Through Postmodern Feminisms - *Undeclared*
- 9.5: Diversity Politics Through Reconstructivist Intersectional Feminisms - *Undeclared*
- 9.6: Displacement Through Feminist Reconstruction of Diverse Legal Norms - *Undeclared*
- 9.7: Displacement Through Feminist Reconstruction of Diverse Parliaments - *Undeclared*
- 9.8: Civic Republican Intersectional Feminism - *Undeclared*
- 9.9: Displacement of Individualist Liberty Through Feminist Republican Reconstruction of Intersectional Political Liberty - *Undeclared*
- 9.10: Conclusion - *Undeclared*
- 9.11: Glossary - *Undeclared*
- 9.12: References - *Undeclared*
- 9.13: Discussion Questions - *Undeclared*

◦ 10: Environmentalism - *CC BY-NC 4.0*
- 10.1: Basics of Green Theory - *Undeclared*
- 10.2: Climate Crisis - *Undeclared*
- 10.3: Climate Change - *Undeclared*
- 10.4: Human Security - *Undeclared*
- 10.5: Community Threats - *Undeclared*
- 10.6: Economic Threats - *Undeclared*
- 10.7: Environmental Threats - *Undeclared*
- 10.8: Food Threats - *Undeclared*
- 10.9: Health Threats - *Undeclared*
- 10.10: Personal Threats - *Undeclared*
- 10.11: Political Threats - *Undeclared*
- 10.12: Conclusion - *Undeclared*
- 10.13: Glossary - *Undeclared*
- 10.14: References - *Undeclared*
- 10.15: Discussion Questions - *Undeclared*

◦ 11: Conclusion - Ideology in the Globalized Future - *CC BY-NC 4.0*
- 11.1: Ideology - *Undeclared*
- 11.2: International System and Globalization - *Undeclared*
- 11.3: Levels of Analysis - *Undeclared*
- 11.4: International System, Sovereignty, and the State - *Undeclared*
- 11.5: The State - *Undeclared*
- 11.6: Globalization - The 4th Level - *Undeclared*
- 11.7: Ideology and the Trajectory of the International System - *Undeclared*
- 11.8: The Liberal International Order 1945-1991 - *Undeclared*
- 11.9: The Evolution of Liberal Internationalism at Home and Abroad - *Undeclared*
- 11.10: Other Factors - Technological and Climate Change - *Undeclared*
- 11.11: Problematization of China - Case Study in

Systemic Change - *Undeclared*
- 11.12: Conclusion - *Undeclared*
- 11.13: Glossary - *Undeclared*
- 11.14: References - *Undeclared*
- 11.15: Discussion Questions - *Undeclared*

- Back Matter - *CC BY-NC 4.0*
  - Index - *CC BY-NC 4.0*
  - Glossary - *CC BY-NC 4.0*
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  - Detailed Licensing - *Undeclared*

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