



**Journal of
Political
Sociology**

2025 | Volume 3 | Issue 1

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Journal of Political Sociology

2025 - Volume 3 - Issue 1

**RADBOD
UNIVERSITY
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Journal of Political Sociology

Published by RADBOUD UNIVERSITY PRESS

Postbus 9100, 6500 HA Nijmegen, The Netherlands

www.radbouduniversitypress.nl | radbouduniversitypress@ru.nl

ISSN: 2950-2144

E-ISSN: 2950-2152

Website: journalofpoliticalsociology.org

Design: Textcetera, Den Haag

Print and distribution: Pumbo.nl

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EDITORIAL

Inquiring transformations of state, economy and society

Felix Petersen* and Martin Seeliger**

Transformations and social inquiry

Two seminal texts of twentieth-century social research analyze the emergence of modernity under the concept *transformation* – Karl Polanyi's *The Great Transformation* (1944) and Jürgen Habermas' *The Structural Transformation of the Public Sphere* (1962). Their work converges on important issues and is essential for contemporary social research, although Polanyi and Habermas contributed to different waves of political, economic and social thought.

Karl Polanyi was born 1886 in Vienna. He grew up in Budapest, fled in the interwar period first to Vienna and then to London, before leaving Europe in 1940 for the United States. In Budapest, Vienna and London, Polanyi was involved in working-class politics and workers' education. His whole life was shaped by the turmoil and tectonic changes set into motion with the two World Wars. And different authoritarian contractions forced him to leave everything behind and continue his work in new places. Jürgen Habermas was born 1929, the year of the Great Depression, in Düsseldorf. He grew up near Cologne, where his father – an NSDAP member later classified by the allied forces a *follower* (*Mitläufer*) – headed the Gummersbach branch of the Chamber of Industry and Commerce. The legacy of the Third Reich became a driving force for Habermas' criticism and turn towards critical theory.

Comparing these two scholars, we notice the influence of historical transformations over their own experience, life and work. And there are similarities beyond the focus on transformations that are worth pointing out. Both Polanyi and Habermas offer substantial critiques of capitalism and emphasize the problematic influence

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of capitalist economy and economic decision-making on politics and democratic government. Among others, Polanyi's work illustrates the destructive force of unregulated markets and their consequence for social and political transformations (Polanyi 1944). Habermas study on the conditions of late capitalism elaborates how economic defects create legitimacy problems for democratic institutions (Habermas 1973). His theories of communicative action and deliberative democracy speak of a "colonization of the lifeworld" through the economic system and its medium (money) and elaborate the consequences of this effect for communication, action, and democratic politics (Habermas 1981; Habermas 1992).

Importantly, both Polanyi and Habermas understand societies as complex arrangements, which entails being aware of the interconnectedness of social structures, institutions, and human relations. We can even argue that their work begins with this assumption of social complexity. With different gestures, Polanyi and Habermas illustrate that irrespective of their complexity, these social arrangements change and transform and are driven by different social, economic and political forces. Societies are then complex social amalgamations that we can only organize and systematize to a limited degree, even with methods of social research. Accordingly, distinctions such as private and public, or state and economy, are merely auxiliary means to live up to the claim of systematic social research.

Returning to the observation that Polanyi and Habermas analyze the emergence of modern society with reference to the concept *transformation*, a discussion of their arguments might be helpful – in particular in view of the inflationary use of the term *transformation* in contemporary social research. Engaging with their inquiries into larger social transformations allows us to reconstruct the framework of this issue of the *Journal of Political Sociology*.

Polanyian transformations

In *The Great Transformation* (1944), Polanyi examines the role of the market in sequences of social development. The premise underlying his perspective is the idea that society and nature provide the basic conditions for the existence of the economy. Concurrently, the economy has a tendency to consume and deplete its social and natural resources. Polanyi's concept of fictitious commodities offers a lens through which to comprehend this dynamic. He identifies money, land and labour as such commodities, since they do not come into existence because they are produced to be sold in a market, like other commodities, but because they follow a more genuine state of existence. As these three commodities become increasingly subject to the prevailing market logic (in other words, bought and sold with little or no regulation), there is a concomitant loss of their use value. Polanyi refers to these

sequences of social change as “waves of market disembedding,” which occur when fictitious commodities are commodified.

Along these lines, Polanyi reconstructs two waves of modernization, reaching from the eighteenth to the twentieth century. Firstly, the reform of the Poor Laws and the privatization of rural land drove English workers into the industrializing cities. In response, trade unions and welfare institutions emerged, enabling the state to regulate proletarian labour markets. A second wave of commodification came with the abandonment of the gold standard in the 1920s. Again, these developments were contradicted by the emergence of national political movements, ranging from Roosevelt’s New Deal politics to Stalinism and Hitlerite fascism.

Drawing on Polanyi’s line of reasoning, we can argue that globalization has since the 1970 set off a third wave of *market disembedding*. In this transformation, the increase in the supply of labour through the expansion of the market increased its commodity character. And capital has been able to reduce wage costs and cut social benefits in Western countries by relocating production capacity to low-wage countries, while at the same time stimulating consumption with cheap goods. Using Polanyian theory, we conclude that these developments have significantly contributed to the current political crisis and the rise of a new authoritarian populist right (on this issue, Petersen, Brunkhorst, Seeliger 2022).

Habermasian transformations

In *Structural Transformation of the Public Sphere* (1962), Jürgen Habermas also studies a constitutive *transformation* in the development towards contemporary society. He identifies the preconditions, dynamics and prospects of public reason that societies mobilize at the intersection of civil society and media (Habermas 1989). According to his inquiry, the public sphere becomes a central element of social organization because modern societies identify and order their political problems according to their urgency and degree of solvability through the public sphere (see Habermas 1992; on public problem-solving, see Petersen 2022).

Interestingly, Habermas’s conceptualization of the public sphere resembles Polanyi’s two waves of structural transformation. Habermas (1989, 1992) argues that the public sphere emerged in the seventeenth century. As modern family structures evolve, a locus for the exercise of literacy, debates and general humanity emerges. In the pre-industrial societies of seventeenth- and eighteenth-century Europe, coffee houses and salons served as the breeding ground for the modern public sphere. This sphere underwent significant changes in the course of a second wave of structural transformation. Over the course of the twentieth century, the rise of mass media and the encroachment of the welfare state into the domestic sphere of the household slowly undermined the rational character of the public sphere. Once a bastion

of rational discourse, the public sphere transformed into a complex apparatus for the production of affirmative ideologies.

Drawing on Habermas observations, we can argue that a third structural transformation of the public sphere is currently underway. As Seeliger and Sevigani (2022) explain, this last sequence is driven by the interplay of three trajectories: globalization, digitalization and commodification. Through this last transformation, the potential for mobilizing collective reason through public debate has further decreased. In our view, this development drives the crisis of liberal democracy and contributes to the return of authoritarianism.

Structure of this issue

The contributions to this issue of the *Journal of Political Sociology* discuss the transformations at the heart of Polanyi's and Habermas' work. Broadly speaking, the articles are inquiries into the political negotiations over the (de)commodification of labor or the social construction of collective reason in political communication.

Bjarke Refslund and Jens Arnholtz study how work and workers influence politics. Jürgen Beyer's article examines the *relief of responsibility* and its pervasive influence over capitalist market societies. Martin Höpner's and Maximilian Kiecker's contribution explains the Nordic opposition against the European minimum wage directive. Martin Höpner and Maximilian Kiecker construct the basic framing of a political sociology of crisis and discuss possible characteristics of a genuine political-sociological approach to this topic. Gabriella Scaramuzzino and Roberto Scaramuzzino analyze the framing of hate speech, threats, and harassment by Swedish civil society actors.

The issue also includes a review article and an interview, both focusing on the political consequences of the current transformation. Udeeta Chakravarty's review article analyzes the latent normativity inherent to most theoretical projects examining populism. Felix Petersen and Martin Seeliger speak to the German intellectual Ingar Solty about Trump's election victory and the transformation of American democracy.

The last contribution to this issue remembers Michael Burawoy, who tragically died on February 2, 2025. Gay Seidman's obituary remembers this great sociologist and recapitulates his work and influence on the discipline and the community of social researchers.

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RESEARCH

How work and workers influence politics: Analysing the nexus through power resource theory

Bjarke Refslund* and Jens Arnholtz**

Abstract

The conjunctures between work, the economy and the political system continues to be a core issue within sociology. In this article we discuss how power resource theory can provide an analytical and theoretical lens that can enrich our understanding of the nexus between work, labour markets and politics. We emphasise how power and the power resources of labour (still) matter, such that workers and unions with more power resources can secure better conditions in the labour market, and we discuss the most important mechanisms through which the realm of work and political as well as broader societal outcomes are linked.

Keywords: Power resource theory, Political power, labour politics, trade unions, wage setting, organised labour

1. Introduction: Work, wage labour and politics

The connection between politics and economy has been a core topic in the social sciences since the work of Adam Smith and Karl Marx. The link remains a key research (as well as political) topic, but the understanding of the linkages between politics and economy has shifted over time. While recently much focus has been on macro-economic policy, financial regulation and housing market politics, the starting point for this article is that the sphere of work remains the most pivotal linkage between

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politics and economy. Whether formal or informal, work remains the main source of income and identity formation for most of the world's population, shaping the conditions for their material lives and thus affecting their political outlook. While different cleavages structure peoples' political demands (Lipset/Rokkan 1985), we argue that those derived from the labour market remain pivotal, although political behaviour and voter preferences are arguably turning more diverse. Through the world of work the economy thus shapes the political position of major population groups via demands for social protection, decent wages and gainful employment. And through political regulation of labour markets and employment conditions, politics has a major impact on the functioning of the economy (Burawoy 1985). However, in this article we focus on the connection from the sphere of work to the sphere of politics, and not the other way around. The interaction between work, the economy and politics was at the core of many political and sociological studies until the mid-twentieth century, but it received less attention in the last part of the century and during the early twenty-first century. One reason for the waning interest in work and workers in mainstream political science and economics is the declining power and political influence of workers and organised labour (mainly unions and political parties affiliated directly with workers) (Gumbrell-McCormick/Hyman 2013; Lehndorff et al. 2018; Visser 2019). In recent years, however, labour politics has gained renewed attention in the broader public and academic debates due to growing concerns about inequality (Atkinson 2008; Fischer/Strauss 2020; OECD 2011; Piketty 2013; Savage 2021). Obviously, inequality does not only stem from the labour market, but labour market inequality makes up an important component of the development. Yet, recognising the growing inequality does not explain it, and we believe that there is currently a strong need for an analytical approach that can explain developments in labour politics.

The aim of this article is twofold. Firstly, we want to argue that labour politics and work is still highly influential in explaining the intersection of economy and politics, and hence that labour and workers still matter. Secondly, we will argue that power resource theory is a valuable tool for analysing the nexus between work, economy and politics. Power resource theory analytically and theoretically emphasises the strong linkages between labour market configurations and industrial relations on the one hand, and political developments, in particular redistributive processes, but also conflict patterns, institutional settings and even the citizens' worldviews, on the other (see e.g. Korpi 1981: 21; Arnholtz/Refslund 2024b). In power resource theory, the power resource distribution and configuration is pivotal in explaining developments in labour politics, but also in the economy and politics more generally. There is obviously other strands of literature that have emphasised work and labour markets as central for connections between economic production and politics. This includes regulation theory (Boyer 1990; Boyer/Saillard 2002; Hollingsworth/

Boyer 1997), marketization theory (Greer/Umney 2022), the varieties of capitalism framework (Hall/Soskice 2001) and the liberalisation school (Baccaro/Howell 2017). They highlight that theorising and understanding this linkage remains highly salient for explaining political developments, and underline that a strong separation between the political realm and the realm of work will always be artificial. Politics, the economy and the sphere of work must analytically be understood as entwined. This article accordingly discusses the strong entanglement of the developments in the labour market with the economic and political developments. This also implies a disciplinary entanglement that cuts across political economy, political sociology and industrial relations. However, beyond recognising this entanglement, we also need to emphasise the centrality of power and power resources in shaping the nexus between work, economy and politics. Some of the literature mentioned above tend to neglect power. Here we argue that by understanding the labour market in a power resource frame we can better explain how, for instance, declining wages and labour shares come about and how they affect politics as well as broader political developments in inequality, social cohesion and social stratification. This enables us to take into consideration the enduring importance of power and conflict, rather than assuming these have become redundant.

2. Power resource theory as an analytical lens to link politics and the sphere of work

Conflict and power were once key concepts when studying capitalism and labour politics. At least since the works of Marx, attention has been paid to the (overt and covert) conflict between capital and labour¹ under capitalism, and even if early scholars of employment relations did not subscribe to the full thrust of Marxist analysis, their starting point was typically a recognition of the crucial role power played in shaping labour relations and national labour institutions. However, in recent decades the concept of power has gained much less attention in most studies on political development and development in the realm of work. Wages have been viewed as the result of workers' productivity only (Rosenfeld 2021), while policy development has increasingly been interpreted as the result of coordination efforts under given institutional settings. We propose power resource theory as a theoretical and analytical

¹ We use the terms labour and capital to describe the aggregated interest of workers and employers, as this article is mainly concerned with macropolitical issues. This is of course an oversimplification, and we cannot per se deduce from the level of workers and employers to the capital/labour aggregation, but for the sake of simplicity we use these terms here. See (Arnholtz/Refslund 2024a) for further discussion of workers' interests.

tool for refocussing studies of contemporary capitalism to the core dimensions of power and conflict.²

The basic tenet of power resource theory is that employers have a structural advantage over workers through what Korpi describes as “*potential and actual concentration, ease of mobilization, ease of transformation and range of applicability, capital and control over the means of production*” (Korpi 1978: 23, emphasis in original). While acknowledging this fundamental power asymmetry, the core assumption of power resource theory is that labour (and hence workers) can mobilise various power resources to reduce the employers’ dominance in labour relations. Likewise, employers and capitalists can mobilise power resources beyond those inherent in their structural advantages. These can be analysed and understood in a power resource theory approach even if they do not per se mirror the power resources labour holds. The power of employers and capital should therefore be further scrutinised, as an emerging literature has recently done (Busemeyer/Thelen 2020; Culpepper 2010; Morgan 2022; Syrovatka 2024). However, the emphasis of this article is on labour and the power resources it can mobilise.

The conflicts that follows are embedded in the broader political setting and in societal structures. This has implications for our understanding of the nexus between work and politics as well as our understanding of the state (as we will elaborate below), but it also has implications for our understanding of what power and power resources are. While classical power resource theory understood power as actors’ ability to punish and reward their direct opponents, we define power more broadly as *the capacity of social actors to promote, accommodate or resist change in accordance with their interests*. This broadening of the definition of power is aimed at acknowledging how actors may exert power in indirect ways by, for instance, changing societal institutions and discourses. Emphasising power as a latent capacity is important as this illustrates that power can be effective even when not exercised, as actors assess the power of other actors before they act, something that has been somewhat neglected by many contemporary power resource studies that emphasise overt conflict. We must therefore also study power even when it is not exercised.

Building on this, we develop power resource theory by explicitly defining what power resources are. We define power resources as resources *actors can mobilise to amplify their capacity to promote, accommodate or resist societal change in accordance with their interests*. We thus advocate a resource-based theory of power which mediates between practice-based theories of power and structure-based theories of power (for an elaboration, see Arnholtz/Refslund 2024a). Focusing on resources is

2 Many of the definitions and reflections used are developed in Arnholtz and Refslund (2024a), on which the following section draws heavily.

exactly what allows us to study power when it is not exercised. At the same time, we emphasise how actors must mobilise these resources to amplify their capacity and power. Power resource theory has often been criticised for viewing power resources as something actors have and which unilaterally determine their power irrespective of what they do with them. Our definition stresses the actors' ability to draw on these resources, rather than something actors have, and although resources can enhance power, they are not power in themselves. In such a manner, power resources do not guarantee the capacity to promote, accommodate or resist societal change – they only amplify that capacity.

These theoretical considerations help us open up power resource theory to more nuanced studies of power. Gradually, power resource theory has started to acknowledge different sources of power (Wright 2000; Chun 2009; Schmalz/Dörre 2014). Building on this, we define five fundamental types of power resources for studying contemporary labour politics. First, structural power is the capacity to control, structure and disrupt societal production and distribution. Second, associational³ power is the organisational capacities often associated with trade unions that enables organisations to create and express unity of action among members and to affect outcomes in line with their interests. Third, we define institutional power as the capacity to use formal rules to enable one's own ability to influence labour politics and limit opponents' ability to do so. Fourth, we define ideational power as the capacity and legitimacy of actors to use ideas, frames and norms to promote societal and discursive change in accordance with their interests including influencing other actors' normative and cognitive beliefs. Fifth, coalition power is the actors' capacity to build relationships, align interests and define the spaces and scale of these coalitions with other actors in ways that allow them to promote their interests (see Arnholtz/Refslund 2024b for an elaboration).

It is important to have a more nuanced understanding of power resources by operationalising these five types of power resources for at least four reasons. First, without the distinctions, the structural and organisational/associational resources (in particular members) tend to be emphasised. While the structural and associational power resources have been the most recognised in the literature (and maybe also the most effective power resources), they are also the ones where workers' power has been most consistently exposed to decline. Overlooking other sources of power resources can provide a false understanding of the power resource distribution and can ignore potentially very important power resources. Second, the compositional effect of power resources will often explain both actors' strategic choices

3 We follow the established tradition in the literature by terming it associational power resources, however we do argue that organisational power resources would be a more accurate description.

as well as how successful they will be. Accordingly, not only the volume, but also the composition of power resources matters (Meardi 2024). Third, the interaction of different power resources varies. Strong ideational power resources can help build coalitional power, because actors can more easily convince others to cooperate. On the other hand, strong institutional power resources that regulate power struggles and protect workers are claimed to reduce unions' and workers' ability to apply structural power resources or sustain their associational resources (Hassel 2007). Fourth, some types of power have a more direct application and immediate effect than others. For instance, the exercise of structural power often has a very immediate and tangible effect, while ideational power has longer-term and more indirect effects (Arnholtz/Refslund 2024b). Ignoring something like ideational power will therefore imply ignoring drivers of subtle, long-term changes in labour politics. In sum, we arrive at a more nuanced understanding of contemporary capitalism by differentiating between types of power resources.

While power resource theory emphasises the unequal power distribution and basic antagonisms between capital and labour (Korpi 1978, 2006) – not only about wages but also about the organisation of work itself (Edwards 1986: 5) – this does not imply that employers and workers cannot cooperate. Rather than only focusing on conflict, power resource theory allows us to both study and theoretically explain situations where workers and employers share interests and make compromises beyond the zero-sum game. This is often true in individual companies, where workers and management have a common interest in ensuring the continuation of the company (Edwards et al. 2006, for elaborated discussions of the workplace level see Edwards 1986). It can also be true at a societal level, for instance in terms of improving economic growth or combatting stagflation (Korpi 1981). However, power resource theory emphasises that cooperation is conditioned on the distribution of power and actors' acknowledgement of each other's power resources (Refslund/Sørensen 2016; Wright 2000). Moreover, a contemporary power resource theory needs to acknowledge heterogeneity of employers as well as workers and their preferences (Arnholtz/Refslund 2024b). Overall, we argue that power resource theory should be used as a dynamic framework, where the actors' agency and positions matter, but where both workers' and employers' power resources shape the range and scope of the choices available to them to impact the political sphere.

3. Does labour (still) matter?

One objection against power resource theory is that its focus on labour, workers' and unions' power is obsolete because labour has become too weak and fragmented to really matter beyond the realm of the employment relation, and even in the employment relation it may not have much power, at least in certain contexts.

Under Fordism, wage increases were instrumental for creating demand and growth, but this is no longer the case under post-Fordism (Boyer 1996; Howell 2021). This argument has been followed by growth model scholars, who emphasise how shifts from wage-led to debt- or export-led growth has undermined the position and importance of labour (Baccaro/Pontusson 2016). In the varieties of capitalism literature (Hall/Soskice 2001), the main focus has been on employers and their motivation for supporting national institutional setups. A similar trend can be seen in the shift towards electoral politics proposed by Iversen and Soskice (2015). They argue that we should shift our focus from corporatist institutions and the collective actors that populate them towards electoral politics based on other issues than traditional class-based ones.

These arguments are all important and relevant to consider, and most of them point to important issues that should not be ignored when re-emphasising workers' power. Power resource theory should not be reduced to a simplistic claim that power struggles and configurations of power determine everything, and least of all an argument claiming that workers can determine everything if they just organise. Nevertheless, the capitalist exchange in the labour market remains pivotal for understanding contemporary capitalism and struggles between labour and capital do indeed matter, whether it be power struggles at the workplace, sector or societal level. For instance, while macroeconomic policies, interest rates and export balance may be central to GDP growth, wages and jobs are particularly important because they are both central to economic growth but also remain pivotal for workers and their everyday lives. Jobless GDP growth via financialization does not satisfy workers' need for gainful employment. Therefore, workers will use both their individual and collective resources to improve their jobs and wages – to the extent that it seems possible.

No one denies that the number of strikes in OECD countries has tended to decline, nor that trade union density has dropped (Gumbrell-McCormick/Hyman 2013; Visser 2019; Waddington et al. 2023). However, this is, we purport, because employers' power has become so dominant in many places that workers have regarded the use of collective resources as too risky or straight-out meaningless. Yet, to conclude that labour struggle is over, and that labour is no longer relevant as a societal actor not only ignores the agency and interests of the workers and their organisations – in particular unions – on a theoretical level. It also seems highly untimely given the recent spur of labour struggles observed, for instance in the *great resignation* of workers from sub-standard jobs that followed the Covid-pandemic, the organising efforts and labour unrest in companies that were previously very little disposed to these, such as Amazon, but also in various platform work as well as the waves of strikes across Europe in the last couple of years. It would also be to ignore that those countries where workers are strongest (most highly organised, best placed in terms

of collective bargaining, etc.) are also the countries where workers are doing best in relative terms and where inequality remains lowest. Thus, as Pontusson (2013: 803) argues, empirical data still “yields considerable support” for claims that union density (and support for left wing government) “promotes compression of market earnings as well as redistributive government policies”. When we want to understand broader developments like the increasing inequality (Atkinson 2008; Fischer/Strauss 2020; OECD 2011), we must still understand what is going on in the labour market, and hence how (power) relations between workers and employers are developing.

Again, this is not to question whether the deterioration of working conditions highlighted in much political economy literature is occurring, but rather to argue that workers and their collective action still matter for *how* these developments play out. It may even be that the tide will turn at some point. Plenty of studies show that unions remain important for wages, benefits and reducing the risk of low pay (Wilmers 2017; Kristal et al. 2020; Brady et al. 2013; Keune 2021; Kollmeyer 2017; Western/Rosenfeld 2011), just as unions can counteract the erosion of employment standards in the face of, for example, technological change (Parolin 2021). Recent studies also show that labour can have the important effect of structuring national growth models (Bondy/Maggor 2024). Therefore, we argue that labour still matters, and the power it holds is well worth studying. We suggest that power resource theory is the best approach for doing so.

4. Understanding the nexus between politics and labour politics

Arguing that the development in work and labour politics is important for the political sphere only gets us halfway. We still need to provide some answers to the basic question: How do we get from the sphere of work to the political sphere? In the sections below we discuss some of the key venues and mechanisms that channel changes in industrial relations and labour markets into the political system through a power resource lens. However, before we can discuss how interests related to work and employment are channelled into the political sphere, need to elaborate our understanding of workers interests. Here we utilise the concept of labour politics⁴, which we define as the political areas wherein an assumption that workers' interests are uniform is most likely to be fulfilled. This definition of labour politics is closely

4 Here the term *labour politics* broadly resonates with the theoretical framework by the Wissenschaftszentrum in Berlin in the 1980s of *Arbeitspolitik* (see Müller-Jentsch 2004: 20-21), as well as theoretical underpinnings of work and politics in the regulation theory school.

related to the capitalist mode of production, where wage labour remains pivotal,⁵ which accordingly requires us to address issues of interest and class. While it is beyond the scope of this article to fully engage with these debates, we need to consider how class and interests relates to work, politics and economy. The key question is how and when we can meaningfully assume uniform workers' interests. Assuming that workers share *all* interests may serve well for some analytical purposes and was a basic assumption in classic power resource theory (Korpi 1978: 202, 2006: 177), but it is of course a crude simplification of reality (which Korpi also acknowledges).

First, workers do not always share interests, not even at the company level.⁶ For instance, some workers may be inclined to take industrial action to improve wages and working conditions, while other workers in the same workplace may emphasise the safety of having a job over trying to improve the conditions via industrial action. This heterogeneity of interests becomes even more pronounced once we turn to the societal level and the sphere of politics. Yet, differences in interests vary with the content of the policy at stake. On policy issues like unemployment benefits and pensions it appears safe to assume that workers' interests would to a certain extent be aligned around a measure of decommodification (Esping-Andersen 1990), while on issues like climate change, public support for culture or foreign relations it becomes much more problematic to assume uniform interests among workers.

Second, we need to theoretically reflect on how and when we can meaningfully understand different actors as promoters of workers' interest. In the classic power resource theory literature unions and social democratic parties were seen as class-based agents representing the interests of the working class and the workers (with the latter two typically being subsumed under the same heading) (Korpi 1978, 1981; Stephens 1979). This of course is also a crude assumption. As Wright (2000: 962) argues, classes as such do not have interests – these are formed by the interests of the actors in that particular class. The reach of the assumption of unions and social democratic parties as representatives of the working class has beyond doubt been weakened since the writings of Korpi, and we therefore need to reflect on whether making such an assumption is still helpful (Arnholtz/Refslund 2024a). We will discuss the link with the political system through political parties, especially the social democratic parties, below.

5 Although we recognise that there are globally many workers who work under different modes like forced labour, self-employment and work that is not remunerated in the capitalist system, like most household and care work.

6 This was also highlighted by Korpi, who stated: "However, the concept of class is not sufficient when we try to describe the current interest pattern of different categories of people" (Korpi 1981: 16 our translation from Swedish).

Third, and perhaps most importantly, we must consider the increasing diversification of the working class. Historically it has been argued that workplace collectives and working-class culture (Brody 1993; Lysgaard 1967; Thompson 1968) provided the foundation for class-based power resources (see also Korpi 1978). However, the importance of working-class culture and workplace collectivism is declining as identities derived outside the realm of work is growing in importance. Yet, while the impact of other identities is growing this does not preclude that work and working-class culture can remain influential (or regain prominence), and some growing working-class awareness among less traditional groups of workers like nurses and teachers can be observed.

When theorising the nexus between work and politics, we must have these three important caveats in mind. This further suggests that contemporary applications of power resource theory should also look beyond unions to identify sources of workers' power resources, in particular where unions' influence have declined and in endorsement of the increasing diversity of workers. Furthermore, we must recognise that interests need to be acknowledged, articulated and negotiated to be turned into real-life preferences, which in turn are fluid and may change over time (Arnholtz/ Refslund 2024a; Meardi 2011). Therefore, articulating the interests and preferences becomes important in labour politics as well as in everyday labour struggles, which underscores the relevance of ideational power resources. This implies that establishing a sphere of labour politics, where workers have common interests, is itself an achievement for labour. Furthermore, it implies that this sphere of labour politics is malleable, since the articulation can change of what constitutes workers' interests and how they can be served.

5. Workers and unions in the political system

Having clarified our understanding of labour politics and workers interest, we now turn to the different channels and mechanisms that brings interests related to work into the political sphere. The most direct way for workers and unions to achieve political power is by engaging directly in the political system. Classic power resource theory literature (Korpi 1981) anticipated that labour would take the (industrial) struggle into the political sphere, and accordingly produce a peaceful outcome of the class struggle – what Korpi famously termed the *democratic class struggle*. Scholars of the original power resource theory strongly emphasised the role and impact of social democratic parties as the labour movement' extended political arm, where workers would vote for the social democratic parties, which in turn would represent the interests of the working class (Korpi 1981; Stephens 1979). Korpi argued that the strong tie between social democratic governments and the union movement opens an "inside track" to the state, which reduces the strike level, since unions' (and hence

workers') interests were (at least to some extent) accommodated by the social democratic government (Korpi and Shalev 1979: 182). The strong ties originated from the history of the trade unions and labour movements, where the emergence of the trade unions went hand in hand with a demand for full political citizenship for the working class, including the right to vote. This, combined with the strong ideological links between trade unionism and political parties, in particular social democratic parties in the early formative years of the labour movements, historically resulted in very strong ties between social democratic parties and the union movement, to the extent that Ebbinghaus (1995) talked about the two actors as "Siamese twins" and Korpi earlier talked about "labour's two wings" (Korpi/Shalev 1979: 181).

Yet, there are some important caveats to this story. First, as Korpi (1981) recognised, there may be other cleavages than socio-economic ones (such as religion or ethnicity) structuring electoral politics (see also Lipset/Rokkan 1985). Even if he assumed that these non-class cleavages would decline in importance, they imply that workers voting for left parties were more prevalent in some countries such as the Nordics than others such as continental Europe, where non-class cleavages are more paramount. Second, the historical development since the formulation of classical power resource theory has shown that the importance of other political cleavages, such as ethnicity and core-periphery, have grown rather than declined along with the salience of other political issues like migration and identity politics broadly perceived. At the same time, far-left and far-right populist parties are regaining (their historical) appeal among working class voters, further challenging the classical labour parties. This has resulted in fewer workers voting for social democratic parties (Rennwald 2020), with significant shares of workers voting for far-right parties (Mosi-mann et al. 2019), leading to a weakening of social democratic or traditional labour parties in many countries. Third, Esping-Andersen (1985b) argued that workers could only very exceptionally rely on majoritarian political power and empirically this mainly materialised in post-WWII Sweden. Accordingly, even if broader political working-class interests could be defined, it was always in need of political allies and could never be taken for granted. Therefore, workers and political parties affiliated with workers (to a greater or lesser degree) need to engage in cross-class political alliances which, according to Esping-Andersen (1985b), together with the coherence of the right parties, have had great influence on how successful workers have been in different political systems. This in turn points towards the importance of coalitional power resources, which we introduce and emphasise as a unique power resource.

At the same time, the bonds between unions and social democratic parties (as well as other parties, including Christian Democratic ones) have radically diminished across Europe (Gumbrell-McCormick/Hyman 2013; Rennwald 2020; Upchurch et al. 2009), and even where the ties remain the social democratic parties have in many cases been greatly weakened. In most countries the formal ties between unions

and social democratic parties have been abandoned concurrently with many social democratic parties abandoning their Keynesian heritage of, for instance, full employment (most prominently in Germany and the United Kingdom) (Allern et al. 2007; Upchurch et al. 2009). Besides trade unions increasingly engaging with other political parties and actors (Rennwald 2020; Spier 2017), it may also imply that political ideas aligned with workers' interests have less influence on social democratic politics (Mudge 2018). It can even be argued that the political systems' overall responsiveness to the interests of workers have declined (Elsässer/Schäfer 2022; Hacker/Pierson 2010). Nonetheless, workers and unions can impact the political system by ensuring unionists are elected for political representation. Historically there was often a high share of the political representatives that came from the union cadre, in particular in social democratic parties, but also very often in socialist and communist parties. This share might have declined, though unions' financial and public support may still be important for some political candidates.

Additionally, workers and unions have venues of political influence other than electoral politics. Often unions have a political entry point via corporatist institutions, where government attempts to coordinate societal governance with representatives from business and labour. While corporatism has been declining in Europe, there are examples of renewed attention being devoted to the formal incorporation of unions in policy deals (often termed social pacts). Ebbinghaus and Weishaupt (2021) argues the extent of social pacts and social concertation depends on unions' power resources, while Rathgeb (2018) argues that it is mainly weak governments that use corporatism to legitimise their policies. The former argument is clearly compatible with power resource theory, but the latter may also suggest that unions can increase their influence through corporatism when governments are weak. The more organisational/associational power resources unions have the stronger their capacity to influence political issues will be.

One particularly important element that follows from our advancing of a revitalised power resource theory is the ideational power resources. We argue that labour's ability to engage with and shape societal norms, ideologies and discourses have been broadly overlooked by classic power resource theory. Accordingly, we stress how unions and workers utilise various ideational dimensions to change and alter politics. This relates both to actual labour struggles, where ideational power resources can be pivotal for the outcome of the conflict (see for instance McLaughlin/Bridgman 2017), but it relates also to the more long-term perspective of the social imaginary. This includes unions' position as legitimate societal actors (Wright/McLaughlin 2022), perceptions and struggles of specific policies like unemployment benefits and broader societal discourses like neoliberal ideology and economic thought (Blyth 2002; Kinderman 2017) and the perception of the working class as such (Thompson 1968). We must therefore include labour as an important actor in the public sphere

(Heiland et al. 2024) and in the formation of norms and beliefs about work, class and capitalism that can be used as ideational power resources.

While the connection between social democratic and left-wing parties and unions have decline across Europe, centre-left governments still in general appear to be more attentive to union demands and hence remnants of the *two wings of labour* can still be found. The bond remains stronger in countries with broad union movements, and where the parties are less dependent on state financial support (Allern/ Bale 2017). But equally important from a power resource approach is the degree of embeddedness and historical legacy of unions in the management of society, as these have spilled over into contemporary institutions, state-roles and the position of unions in the public sphere. A power resource theory perspective on contemporary politics must therefore acknowledge and include a historical understanding of the political economy. The historical prominence of unions and social democratic (or labour-friendly) parties in the development of different political systems and in particular in developing egalitarian capitalist societies seems indisputable, particularly in the Nordic countries which have often been termed the social democratic countries (Bengtsson 2023; Esping-Andersen 1985a, 1990; Korpi 1978, 1981). The Nordic countries still feature more labour- and worker friendly institutions, and unions' political heritage provides them with persistently high levels of legitimacy. The Nordic unions' position as a legitimate political actor has so far never truly been challenged, and while the range of topics where it is *natural* for the union to be involved may have diminished, they are still perceived and acknowledged as a natural part of labour politics (and beyond), while in many other political systems unions are seen as irrelevant or an anachronism (Knudsen et al. 2023; Waddington et al. 2023).

6. Institutions as power resources for workers and unions

One of the criticisms often launched against classical power resource theory is that it paid insufficient attention to institutions. It is true that Korpi rejected the crucial importance ascribed to institutions, in particular collective bargaining institutions, by, for instance, the Oxford school of industrial relations (Clegg and Flanders), and instead argued that "institutions play much less of a strategic role and are of importance primarily as variables intervening between the distribution of power and the patterns of conflict" (Korpi 1983: 171). At the same time, Korpi (1981) also described labour market institutions as routinised distributive processes that allowed actors to minimise the cost associated with distributive actions (through mainly industrial conflict). In that sense, it can be argued that institutions become a power resource in their own right, as they secure actors' influence without them having to mobilise

other power resources. Yet, the role of institutions is one of the dimensions where power resource theory needs substantial development, towards acknowledging the importance of institutions as power resources (O'Brady 2021), while retaining the insight that institutions are not neutral but have different effects for labour and capital.

Hence, institutions often have a stabilising effect on the relationship between labour and capital. This is often a resource for workers as it limits the discretionary power of capital, without the actors having to mobilise. For instance, labour laws often outline certain responsibilities employers hold in an employment relationship, and the institutionalised enforcement of such laws sets a limit to how easily employers can ignore these responsibilities to improve their competitiveness in product markets. However, the stabilising effect of institutions can also have the opposite effect, as it can limit workers' opportunities to renegotiate their terms and conditions and to apply their power resources – in particular structural power – as strikes may be regulated. This has implications in situations where labour is gaining in strength and would therefore potentially be able to demand real improvements. Yet the institutional constraints also matter in situations of institutional 'drift' (Streeck/Thelen 2005), where the employer responsibilities outlined by institutions become out of sync with economic realities – as when minimum wages are not adjusted to wage developments or when the definition of an employee is not adjusted to the rise of the platform economy. In sum, institutions can act as a resource for both workers and employers depending on the circumstances.

Institutional power may also stem from the political system, setting the frame for the labour market through, for instance, conciliation and regulation of the labour contract and status, wherefore state governance – and accordingly state tradition for industrial relations and regulations of the labour market – remain highly salient in industrial relations (Bosch/Weinkopf 2017; Crouch 1993; Meardi 2018). Institutions mediate and facilitates the outcomes of industrial relations and labour market bargaining, in particular institutions that facilitate and galvanise collective bargaining and collective agreement setting (O'Brady 2021; 2024). Hence workers and unions may have an institutionalised role in, for instance, unemployment benefits and educational training systems and to varying degrees in regulation and governance of the economy, in particular in regard to wage development. Thus, researchers must pay attention to various institutions and how they affect the power resource configuration and policy outcomes. The institutionalisation of power resources can be an important intermediating variable, so that emphasising national averages (on unionisation and decentralisation among others) may miss important institutionalised power resources.

While there is ample evidence that employers and other actors push for de-regulating and liberalising labour relations (Gautié/Schmitt 2010; Holst 2014; Kalleberg

2009; Schmidt/Thatcher 2013; Weil 2014), there is also counterevidence of institutional resilience despite declines in the other categories of worker power (Kim et al. 2015; Meardi 2018). Institutions accordingly mediate these liberalisation pressures and thus the same factors may result in different outcomes in different institutional settings (Katz/Darbishire 2000; Riain/Flaherty 2020). Institutional changes may also strengthen workers, for example following European union political integration, for instance in Eastern Europe where institutional changes (at least temporarily) strengthened or at least reduced the decline in power of unions despite falling union density after the enlargement of the European Union (Magda et al. 2016). One can talk about the embeddedness of labour-friendly settings and institutions or institutional anchors, which reflects to some degree previous power configurations, so that more labour-friendly institutions may be stickier in certain contexts. The institutionalised power balance may however also change, reflecting shifts in other dimensions of power resources. An example could be the German minimum wage, where a sharp decline in unions' and workers' organisational and structural power resources led to the political system compensating the workers, although the changes came with some influence of the union movement (Bosch 2018).

Nonetheless, even if we recognise the importance of institutions and their function as power resources, it is equally important to maintain that the functioning of institutions can be affected by the distribution of power resources. For instance, while there is strong evidence that the level and centralisation of collective bargaining in itself has an influence on wage inequality and potentially even the labour share, the power of labour also matters for the outcome of collective bargaining and its eventual enforcement. While institutions matter, there is a certain variability in their functioning, which is determined by the distribution of power resources. The same is true for the broader institutional setup and economic growth models that characterise a given economy.

7. Wage setting mechanisms and power

Perhaps the most important and direct way trade unions and workers impact the economic and societal development is through their active role in wage setting, whether they be collective bargaining (Müller et al. 2019) or minimum wage systems (Grimshaw/Johnson 2024), including transnational discussions of, for instance, the European minimum wage (Seeliger 2019). However, the role of unions and workers in these institutions and the outcomes they produce are strongly linked to the power resources and power configuration across different settings. The more power resources unions have the more they can impact wage setting. Kollmeyer (2017), among others, argues that there is a correlation between power resources and wage growth. This is especially true in voluntaristic industrial relations systems where

unions have a key role in the regulation of wages through negotiation as well as implementing, controlling and enforcing central demands at the local level, particularly the company level (Ilsøe 2012). However, even in less voluntaristic systems where wages are regulated via the extension of collective agreements or statutory minimum wages, unions often have some degree of influence (Grimshaw/Johnson 2024).

Wage regulating mechanisms have implications for politics because they influence the differences in earnings between different groups of workers and thus affect the chances that workers regard themselves as having common interests. Additionally, while much of the regulation school literature (Boyer 1990; Boyer/Saillard 2002) and growth model literature (Blyth et al. 2022) views wage setting mechanisms as subordinated to overarching economic developments such as the shift from Fordism to post-Fordism or growth model dynamics, we argue that wage setting institutions like collective bargaining backed by sufficient power resources also constrains and partially shapes a country's economic trajectory. High collective agreement coverage and trade union density will typically force companies to find business strategies that are compatible with higher wages (Barth et al. 2014). Obviously, there are limits to the effect that power resources channelled through wage setting institutions can have on redistribution as too much pressure for wage increases can undermine the viability of companies and lead to wage-led inflation. However, small, incremental improvements can certainly accumulate and thus affect the overall economic structure. This is one of the main points missed by predominant perspectives in comparative political economy – from Varieties of Capitalism to growth models (Blyth et al. 2022) – namely the incremental changes to economic institutions that are created by ongoing overt and covert power struggles in which power resources matter.

Korpi (1981) mainly focused on the major shifts in power balance occurring when labour-friendly governments held majority government over long periods of time, but a contemporary power resource theory needs to be much more sensitive to minor changes in power distributions, institutional setups and dominant coalitions. Some of this sensitivity is provided by focusing on several power resources. While the associational power of labour may be unchanged, workers may be mobilising other resources – such as ideational or coalitional resources – to influence labour politics and institutional change. And such changes may gradually reshape the conditions that companies operate under and thus impact the overall economy.

8. On the role of the state

The state has an important role in the regulation of work and industrial relations (Crouch 1993; Hollingsworth/Boyer 1997; Hyman 2008; Meardi 2018). State-led regulation shapes the labour market and can be supportive of workers' demands, like in

the traditional social democratic societies, which emphasised de-commodification of labour (Esping-Andersen 1985a; Esping-Andersen/Korpi 1984), or in the current context when wages and working conditions reach certain minimums (Bosch/Weinkopf 2017; Meardi 2018). However, most states have also played an active role in facilitating liberalisation and de-regulation of workers' and unions' rights in the labour market (Howell 2021) as well as in marketization (Greer/Umney 2022). Some would argue that this has been the most prominent role played by most states in the advanced capitalist world in the recent decades; in some cases, states even engage directly in the repression of workers, unions and workers' rights, for instance as seen in some countries in the Global South. Moreover, the state is an important actor as an employer, with public employment making up large shares of the workforce in many countries. It is therefore imperative to investigate the role of the state, not least how it is affected by the configuration of power and power resources available to the actors.

The struggle between labour and capital is highly influential for the state and how it positions itself on labour issues (Poulantzas 1978; Jessop 1990), and we argue that the power resources available to labour and capital influences the position of the state – not just in terms of immediate policy outcomes, but also in the sense of state legacies. At the same time it is important to acknowledge that the state is not just an empty shell filled by the outcomes of the power struggles between workers and capitalists. For institutionalists, state institutions are path dependent and therefore difficult to change. We concur to some extent with the institutional position in that the historical heritage is important, and institutions, state traditions and the norms and perceptions in society influence how the state acts (Bosch/Weinkopf 2017; Crouch 1993). For example, the repertoire of policy solutions is flavoured by the state tradition, and while these may change, the potential policy responses remain sticky, and hence partly limited. Therefore, some states continue to act in more labour- and worker friendly ways than others, for instance on key aspects like strike regulation. Moreover, there are internal contradictions between state actors, like political actors, and different state authorities on what the state should do. We must therefore understand the state in the wider social relations (Hyman 2008; Jessop 1990). A fitting example here is ideational power resources, where actors seek to affect the state and the public discourse in ways that can be highly influential on state policies (Hall 1993; Kinderman 2017; McLaughlin/Wright 2024). This in turn helps explain the enduring variation in industrial relations and political economy across countries, which is also backed by empirical evidence that continuously shows national variation linked to power resources in comparative industrial relations studies (Keizer et al. 2024; Meardi 2018; Thelen 2014; Wagner/Refslund 2016). This reflects how many power resources are embedded in state traditions and institutions, and states and

state tradition accordingly amplify or reduce the potential effect of the actors' – both labour and capital – power resources.

9. Conclusion

Despite the decline in the power of unions and workers, they still hold sufficient power resources to impact labour politics as well as politics more generally. Yet the impact is most important within politics directly related to work and employment. Labour politics occupies this sphere situated between the economy, politics (including the state) and civil society. The impact of workers and their interests still reaches into the other spheres, although the impact has declined, for instance in civil society where norms and values stemming from dimensions other than working class affiliations have become more dominant. In this article we have scrutinised how workers and unions impact the political system, with implications for political outcomes like redistributive and regulatory politics and hence with implications for key political issues like inequality as well as the regulation of daily working life. Likewise, the strength and institutional embeddedness of unions has varied the political effect of neoliberalism across Europe (Waddington et al. 2023). Scholars of political sociology who seek to understand broader political-economic developments within contemporary capitalism should therefore take into account the power configuration between labour and capital.

We have discussed some of most important channels through which labour and workers impact labour politics. There has historically been strong bonds between unions and political parties, in particular social democratic ones, however this relation has markedly waned, and unions have diversified their influence through democratic channels, which highlights the importance of coalitional power resources. While the relation between unions and social democratic parties has always varied across time and space, parties to the centre-left in general (still) appear to be more prone to accommodate unions' and workers' demands. Moreover, labour remains an important political actor through, for instance, participation in the public sphere – where the ideational power resources are important – through lobbying and cooperating with other political actors and by having union cadres elected to positions in the political system. Unions also have a focal, direct role in the wage setting systems, which are highly influential for economic policies, yet this role also varies significantly across countries. In many countries unions still hold enough institutional power through state and corporatist institutions to influence a broad range of political issues, including unemployment benefits, educational training and to some extent economic policies.

Power resource theory emphasises that workers and unions remain important actors – both directly through the political channels highlighted – but also indirectly

through, for instance, their structural power in the labour market often materialised in labour struggles and ideational power resources seeking to change societal ideas and norms. At the same time the theory builds on the assumption that power resources are unequally distributed, and that capital has the upper hand, but that through strategic application of the different power resources workers and unions can off-set some of disadvantages. By studying the different dimensions of power resources, we arrive at a more nuanced perspective on the changes in the sphere of work than that offered by, for instance, a purely deregulatory or neoliberal deterioration viewpoint. And while the influence of workers and labour has declined, in many countries dramatically, we do find numerous examples of enduring worker power – for instance in the Nordic countries – as well as surges in contemporary labour resistance and struggles across both the Global North and South. These remind us that if we seek to analyse and understand contemporary political developments, we must not neglect labour as well as capital's power resources and the configuration of these power resources in the given setting. Here power resource theory provides a useful lens for analysing labour politics.

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RESEARCH

Relief of responsibility: A fundamental principle of the capitalist market society

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Abstract

The relief of responsibility is a cornerstone that shapes capitalist market societies and manifests itself in three central aspects of this economic order: free wage labor, limited liability corporations, and market exchange. Free wage labor is a defining feature of capitalism, in which human labor is exchanged for monetary compensation. However, historical evidence shows that employers have often neglected their responsibilities to their workers, subjecting them to harsh and deplorable working conditions. This has led to government intervention in the form of legislation and social safety nets, effectively transferring responsibility to the state. Limited liability companies offer shareholders protection from personal liability, even in the event of corporate malfeasance. This allows for rapid capital expansion and economic growth in capitalist market economies, but it also shifts the burden of associated risk to society as a whole. Market exchange, characterized by bilateral transactions for mutual benefit, generates externalities that affect third parties. Examples include the consequences of environmental degradation and social inequality resulting from market exchange. In capitalist market societies, the relief of responsibility has a pervasive influence. It is important to be aware of this fundamental principle and its implications so that we can work to create a more just and equitable society.

Keywords: Market society, Responsibility, Limited liability, Market exchange, Free wage labor

1. Introduction

The investigation of responsibility within the realm of economics and economic relations covers a broad spectrum of subjects. Frequently, the focus has been on

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various aspects of businesses, including corporate ethics (Werhane and Freeman 1999; Murphy 1988), corporate social responsibility (Banerjee 2008; Carroll 1999; Hemingway and MacLagan 2004), and compliance and corporate governance research (Griffith 2015; Stout 2001; Blair 1996). Responsibility also serves as a significant research theme in foreign trade studies (Littrell and Dickson 1999; Barrientos and Gereffi 2011; Raynolds 2000) and investigations of economic justice (Sen 1992; Agarwal 1994).

The findings in these areas of research often diverge significantly. Debates have arisen on various issues, such as whether companies bear responsibility beyond mere profit-making, whether CSR activities align with the company's objectives, to whom company managements are accountable, the true fairness and responsibility of *fair* trade practices, and how economically disadvantaged groups can be empowered to participate and attain equitable positions in a responsible manner. These research endeavors generally adopt normative and empirical approaches to determine responsibility but do not delve into questioning whether the capitalist market order¹, within which companies, trade partners, and all economic actors operate, has its own distinct allocation of responsibility.

Unlike previous research, this study does not primarily address how companies can conduct themselves ethically, exhibit social responsibility, and comply with laws, or how foreign trade can be made fairer. Instead, it raises the consideration that the capitalist market order itself is founded on principles that shape the approach to responsibility and accountability in a specific manner. The aim of this contribution is to explore and uncover this particular shaping.

The central thesis is that an examination of various fundamental aspects of market society, such as free wage labor, the prevalence of limited liability in most large firms, and market exchange, reveals that relief from responsibility is a structurally defining characteristic. The objective of this contribution is to illustrate this phenomenon.

To support this argument, I will examine (1) free wage labor, (2) limited liability corporations, and (3) market exchange as the dominant mechanism of goods transfer. The consequence of this structural principle is that those responsible for societal risks are not held fully accountable with a high degree of systematicity, but rather a socialization of costs takes place. Consequently, (4) arguments are presented as to why it is likely that the relief of responsibility has been elevated to a principle in market societies.

1 The capitalist market order is based on several interrelated institutions that significantly affect our daily lives. These include free wage labor, market exchange, private property, money, and for-profit corporations. The institutional sediments (Berger and Luckmann 1991: 85-89) of the capitalist market order are so deep that alternative ideas of social order are considered by most people to be outdated or utopian.

2. Free Wage Labor in the Capitalist Market Order

In contrast to previous societal formations, the capitalism market order is distinguished by the exchange of human labor for monetary compensation as the primary means of acquiring goods. Dependent wage laborers, unlike slaves or serfs, enjoy the freedom to offer their labor to various employers and are not bound by feudal relationships, granting them spatial mobility. However, upon examining the early stages of industrialization and the emergence of market society, it becomes apparent that free wage laborers often faced employment contracts that showcased employers' reluctance to shoulder responsibility for their workers.

Typically, these labor contracts merely obligated employers to pay wages for a specified amount of work, with agreements for grueling work hours ranging from 14 to 16 hours per day (Voth 2002). In cases of accidents or illnesses, workers were commonly terminated, left without their livelihoods due to their inability to fulfill their full work duties. Employers showed little concern for whether the negotiated wages were sufficient for workers to sustain themselves. Additionally, the entrance of women and children into the workforce exerted further downward pressure on wages.

Karl Marx and Friedrich Engels astutely characterized free wage labor as being "doubly free" (Marx and Engels 1968: 183), indicating its emancipation from both original dependence and from the ownership of the means of production required to harness their labor power. Consequently, a critical prerequisite for the establishment of the capitalist market order was the existence of these doubly free workers—individuals emancipated from the traditional bonds of feudal lords or the protection of their patronage.

However, despite this newfound freedom, the living conditions of wage laborers in the early stages of industrialization witnessed a severe deterioration, underscoring the notion that free wage labor, in practice, facilitated an arrangement that exempted employers from assuming responsibility for the well-being and living conditions of their workers, ultimately leading to widespread destitution and pauperism.²

In the context of contemporary European welfare capitalism, beyond the core obligation to pay wages, a myriad of additional primary and ancillary responsibilities have been codified into law. These obligations encompass continued wage payments during periods of vacation or sickness, adherence to minimum wage regulations, the imposition of protection and care duties, and the mandate to reintegrate workers following prolonged illnesses. The evolution of these legal regulations and

2 Ultimately, it was also the landed gentry who brought about the end of feudalism through the enclosure movement. As many small farmers could no longer access the common lands, their only recourse was to turn to wage labor or emigration (Black and Thomas 1974).

the development of the welfare state benefits have unfolded through an extensive historical process, resulting in the gradual transformation and enrichment of the arrangement of wage labor by reducing commodification and introducing legal obligations within the framework of social security systems (Esping-Andersen 1990; Offe 1972).

Consequently, while the responsibility for ensuring a dignified life and an adequate standard of living lies primarily with the welfare state rather than the employers, the structurally embedded relief of responsibility in the organization of free wage labor is ameliorated through governmental intervention.

Free wage labor itself can still be structured in a way that decent living is not guaranteed without state support. The inherent relief from responsibility within the free wage labor system is offset by a state that enforces situational variations in contractual obligations and, when needed, ensures social security provisions. A certain tendency to legitimize and promote the privatization of profits while simultaneously socializing the costs of welfare state security is ingrained in this societal structure.

An examination beyond the confines of welfare capitalist societies highlights the far-reaching geographic disparities of issues that might have been historically perceived as remote. According to a report by the International Labour Organization and UNICEF (2020), an alarming estimate of approximately 152 million children aged 5 to 17 years is exposed to hazardous working conditions worldwide, which imperil their development, education, and overall well-being. These unfortunate circumstances extend to many businesses that are intricately intertwined as suppliers in global production chains,³ wherein children are unknowingly trapped in exploitative labor practices.

Concurrently, the United Nations World Food Programme has reported an astonishing 821 million individuals globally suffering from hunger, an alarming statistic that equates to approximately one in nine people (FAO 2018). These harrowing figures underscore the urgent need for a comprehensive approach to address issues of food insecurity on a global scale. Furthermore, the Global Rights Index compiled by the International Trade Union Confederation (ITUC 2020) reveals that 65 percent of countries across the world lack the right to establish or join trade unions, while in 87 percent of countries, the right to strike is either absent or systematically violated.

These critical findings underscore the prevailing challenges faced by workers seeking to assert their rights and advocate for improved working conditions and fair labor practices. In regions where government authorities fail to effectively safeguard

3 Supply chain laws are currently testing due diligence for decent working conditions, even among suppliers. However, these laws represent only the first strides towards broadening corporate responsibility to encompass supplies (Çelik and Schmid 2022)

workers' rights and ensure decent working conditions, the relief of responsibility on the part of employers perpetuates a vicious cycle of systematic destitution for wage laborers, exacerbating inequalities and socioeconomic disparities.

In summary, it can be stated that in the transition from previous societal formations to a market-oriented society, the newfound freedom of workers was accompanied by a relief of responsibility for employers, which could only be restrained again through regulatory measures and the establishment of welfare state structures. As a result, the responsibility for adequate living standards and enabling a dignified life shifted to the state. The relief of responsibility in the system of free wage labor, in turn, became an institutionally secured characteristic of market society. Looking beyond the borders of welfare capitalist societies, it becomes evident that child labor, hunger, and the absence of workers' rights have remained part of the social order, and it is rarely recognized that the responsibility for these global conditions also underwent a process of deflecting responsibilities (Lessenich 2023; Tsing 2009; Wallerstein 2004).

3. Limited Liability Companies and the Legal Acceptance of Responsibility Relief

A prominent hallmark of the capitalist market order is the proliferation and expansion of companies that adopt the legal structure of limited liability. While joint-stock companies existed as early as 1602, they initially held shareholders fully accountable for any liabilities incurred.

The codification of legal forms incorporating limited liability for private enterprises emerged during the 19th century, evidenced by legislative acts such as the 34th New York State Legislature of 1811, the Prussian Joint-Stock Companies Act of 1843, the Limited Liability Act of 1855 in the United Kingdom, and the German Limited Liability Company Act of 1892. In companies operating with limited liability, the company functions as a distinct legal entity, and shareholders are only held liable for the extent of their contributions to the company's capital, safeguarding their personal assets from exposure. This limitation of liability fosters capital accumulation, enabling rapid business growth and scalability for enterprises. Large companies capable of achieving economies of scale and synergies often benefit from cost advantages over their smaller counterparts.

The concept of limited liability is frequently hailed as a social innovation with significant implications for the economic advancement of capitalism. An excerpt from *The Economist* in 1926 attests to its importance: "the economic historian of the future ... may be inclined to assign to the nameless inventor of the principle of limited liability, as applied to trade corporations, a place of honour with Watt and Stephenson, and other pioneers of the Industrial Revolution" (Hodgson 2015: 204).

The principle of responsibility relief is undeniably apparent within the domain of limited liability companies. In the unfortunate event of bankruptcy, claims against these companies may go unfulfilled, ultimately leading to the burden of compensating for the resulting damages falling once again on the state, which acts as the risk-taker of last resort. This also applies particularly to environmental liability (Handl 1980), for example, when bankrupt fracking companies fail to properly close drill holes from which methane gases escape (Tabuchi 2020).

The facilitation of responsibility relief is further augmented by the establishment of joint-stock companies operating with limited liability. This legal framework allows the realization of substantial company sizes wherein a significant number of dependent employees are subjected to the employers' directives. Personal liability is thus confined to a select group of individuals relative to the company's magnitude. Members of management bodies, for instance, bear personal liability solely in cases of proven breach of duty of care. Consequently, systemic gaps in responsibility persist, particularly for companies capable of generating substantial societal risks due to their size and impact.

The situation is aggravated by the fact that corporate law does not prevent the proliferation of legal entities and the deliberate and skillful selection of legal systems, so that responsibility continues to evaporate. As Katharina Pistor has shown, domination over the legal code itself becomes a means of protecting assets and defending against claims (Pistor 2019). Remaining responsibilities often dissolve between the legal constructs, so that after the dissolution of the constructs not much is left but Potemkin facades.

In addition, cases of corporate misconduct may reveal a *too big to fail* phenomenon, where litigation often considers the potential impact of mass job losses. Examples of this include the financial crisis, the auto emissions scandal, and environmental disasters. As a result, limited liability companies serve as a striking example of how relief of responsibility is institutionally embraced and construed as a legitimate incentive to foster entrepreneurial endeavors within the capitalist market order.

When the implications of limited liability are analyzed within the broader framework of the capitalist market order, several critical facets emerge. The relief of responsibility inherent in this legal structure enables corporations to explore ambitious ventures, pursue innovation, and make high-risk investments without exposing the private assets of shareholders to undue risk. Such a risk-mitigating mechanism contributes to a thriving entrepreneurial climate that attracts investment and promotes economic dynamism. However, it is precisely this relief of responsibility that creates moral hazards and encourages imprudent business practices that prioritize short-term gains without regard to long-term consequences.

Furthermore, the unrestricted growth of corporations due to limited liability might exacerbate concerns related to the concentration of economic power. As

enterprises expand their operations and market influence, they could influence legislative and regulatory frameworks in their favor. The confluence of limited liability and expansive business growth may lead to the creation of behemoth entities, further entrenching inequalities and challenges associated with corporate influence in democratic societies.

Moreover, the socialization of losses borne by the state when limited liability companies fail demands careful scrutiny. The burden imposed on society necessitates an equitable assessment of risks and rewards, prompting policymakers to explore mechanisms that balance responsibility relief with an appropriate level of accountability.

In light of the globalized nature of contemporary capitalism, the ramifications of limited liability companies extend beyond national boundaries. Transnational corporations, often operating with limited liability, wield substantial influence on the international stage, necessitating international cooperation and harmonization of regulations to ensure responsible and ethical practices. The challenges posed by these entities' cross-border operations underscore the need for a comprehensive framework that promotes global responsibility and accountability.

Limited liability companies play a significant role in the capitalist market order, contributing to the promotion of entrepreneurial pursuits, facilitation of capital accumulation, and stimulation of economic growth. However, the structural acceptance of responsibility relief in this legal framework warrants scrutiny and introspection.

4. Market exchange: A Phenomenon of Systematic Responsibility Relinquishment

Throughout human history, societies have been influenced by a variety of economic activities, each of which represents a different set of principles of economic behavior. Polanyi (1957) identifies reciprocity, redistribution, householding, and market exchange as fundamental orientations for action. Market exchange, in contrast to other principles aimed at strengthening community ties, involves bilateral transactions that focus solely on the benefits derived from each transaction. The goal is to maximize benefit or its monetary equivalent, with ownership of goods or services transferred upon completion. According to the ideal type, the social ties formed during these exchanges dissolve after the transaction (Weber 2019).

The focus on gaining benefits through bilateral transactions has the advantage that ephemeral social relationships between strangers become possible for mutual benefit.⁴ Market societies can thus also take on a fluid form of social organization.

4 The ideology of the market economy states that it contributes to the civilization of human social behaviour. In this perspective, which goes back to Adam Smith, markets coordinate the actions of

For the unrestricted maximization of utility through market exchange, it is helpful if depersonalized transfers, in which the exchange partners regard each other as indifferent entities, become the ideal of economic action: "The indexed partner for the transaction ... is the person who is completely indifferent to us, neither for us nor against us" (Simmel 1900: 211, own translation). However, economic transactions that are characterized by such an otherwise indifferent maximization of utility are particularly susceptible to the neglect of transaction effects.

Externalities that are not taken into account (Pigou 1929) are therefore a common consequence of market-based interactions. These externalities primarily affect *third parties* who are not involved in the exchange and do not receive compensation for the consequences. The presence of externalities is strikingly evident in various areas of capitalist market societies. One example is the consequences of climate change, which are borne by the general public. However, these consequences are not fully integrated into the prices of certain goods and services, such as cruises, flights, or meat products. The activities associated with these goods and services, such as the release of CO₂ or methane emissions, have a significant impact on climate change. However, the costs associated with these emissions are not fully internalized in market transactions.

Another relevant example is the health costs associated with air pollution from coal-fired power plants, which are not included in the price of electricity but are passed on to society as a whole. The effects of such economic activities thus extend beyond the direct exchange partners in the transactions and culminate in external effects that are insufficiently taken into account by the prevailing market mechanisms.

In contrast to principles such as reciprocity, redistribution, and budgeting, market exchange does not require that external effects be perceived as a burden on social relations. The uninvolved *third parties* are often seen only as "others" (Staszak 2009), "strangers" (Schütz 1944), or part of the general public. The responsibility for causing these external effects is therefore often not recognized, suppressed or consciously rejected.

In addition to ephemeral exchange relationships, capitalist market societies usually establish exchange relationships that are not one-time interactions with anonymous exchange partners, but are based on more or less permanent relationships between the two sides of the exchange. These repeated acts of exchange establish social relations with a history, an asymmetry of power, but also a sense of trust between the exchanging parties. This is related to the fact that the uncertainty of

self-interested actors in such a way that resources are used efficiently and the resulting distributions are acceptable to all participants, creating a harmonious social order.

overreaching becomes a “problem of cooperation” (Beckert 2009), which requires a sufficient solution for acts of exchange to take place in the first place. Building lasting social relationships through repeated transactions creates trust, which can pay off if it does not blind people to other advantageous exchange opportunities (Uzzi 1999).

However, as long as the basic motive of direct exchange benefit from the bilateral transaction also characterizes these lasting market relationships, the problem of externalization remains or even intensifies. Exchange partners who know each other are in a position to collude in order to avoid paying taxes, to circumvent environmental or labor laws, or to pass on costs to someone else. This becomes particularly clear when considering not only legal but also illegal markets (Beckert and Dewey 2018). If you look at markets for drugs or human trafficking, the two sides of the exchange often know each other very well, and because they know each other so well, they can shift the external costs of their transactions onto society and absolve each other of responsibility to others.

In sum, the specific nature of market exchange as a bilateral, benefit-generating transaction leads to the emergence of effects that extend beyond the direct participants in economic transactions. The presence of externalities is a critical challenge in market societies where responsibility for these effects is not effectively recognized or addressed. Understanding this phenomenon of systematic abdication of responsibility in market exchanges provides valuable insights for designing more sustainable and socially responsible economic systems.

5. Institutionalized Relief of Responsibility

The relief of responsibility is a central characteristic of the capitalist market order, as demonstrated in the previous sections. However, an important question arises: why is this relief institutionalized to such an extent that it encompasses limited liability companies, external effects, and even pressing issues like child labor and hunger in the global South?

One explanation for the relief of responsibility is linked to power dynamics. Capital owners, the beneficiaries of the economic and social order, not only appropriate surplus value from paid labor (Marx and Engels 1968: 605) but also exploit limited liability and externalize follow-up costs to accumulate their wealth. This relief of responsibility for negative consequences serves as one of the “rules of the game” (North 1991) that secures privileged societal positions and widens disparities.

Worldviews, emphasizing freedom, individual responsibility, and self-realization, mainly serve to legitimize shifting responsibility onto others and society as a whole. The supposed equality justifies this attitude and only grants others the freedom for self-realization, even if the initial conditions restrict this *freedom* considerably. Taking more responsibility for others is seen as unacceptable, as it could absolve them of

their own individual responsibility. The belief that *free* individual actions will aggregate for the benefit of society dissolves the responsibility for the whole. These world-views deflect responsibility, enabling its invocation even when *too big to fail* banks are repeatedly bailed out, environmental destruction continues *for the benefit of the economy*, and wealth inequality persists.

A second explanation for the structurally embedded relief of responsibility stems from history, where exceptional circumstances evolved into regular regulations. Internal markets were once limited to specific public places, such as the Agora in ancient Greek cities, to ensure monitoring of price formation and goods exchange among interacting individuals (Swedberg 2005: 234). Trading was restricted to one's own social group (e.g., the citizen community of a Polis) and heavily regulated, with local market exchange as a significant exception. Gradually, with mercantilism and industrialization, markets transformed from enclosed special areas to open systems.

A similar transition from exception to rule is evident in the case of limited liability for joint-stock companies. The initial codifications were temporary, intended for times of war or linked to state concessions. For example, the *Act Relative to Incorporations for Manufacturing Purposes* of the 34th New York State Legislature in 1811 limited liability to twenty years. This regulation aimed to stimulate domestic production during the scarcity of textiles and manufactured goods caused by embargo policies before the British-American War. The Prussian Joint-Stock Companies Act of 1843 also envisioned strict state concessions, abandoning the obligatory commitment to charitable purposes. The Limited Liability Act of 1855 in the United Kingdom was signed during the Crimean War, with the exceptional situation of war serving as a central argument for granting limited liability to joint-stock companies (Djelic 2013; Howard 1938).

The relief of responsibility acted as a targeted incentive for entrepreneurial actions to overcome exceptional circumstances and achieve state objectives. Thus, the relief of responsibility in market society presupposes a state that transforms exceptional circumstances into regular regulations. The co-evolution of market and state in capitalist societal developments relieves market actors of responsibility and increasingly transforms the state into a guarantor of social security and social justice.

Lastly, the relief of responsibility in market society is oriented towards dynamic development rather than resilience or permanence. The majority of people rely on wage labor to secure their livelihoods, driving continuous change through work and transforming nature into culture dynamically. However, the external effects of market exchange and the stimulation of entrepreneurship through the relief of responsibility have led to self-induced risks, which, within the logic of market society, can only be eliminated through labor and innovation. To address these challenges, market mechanisms (e.g. green bonds) and increased relief of responsibility (e.g. solvency guarantees) may once again be considered as potential solutions within the logic of market society.

6. Conclusion

The exploration of the relief of responsibility as a fundamental principle in market societies has illuminated the intricacies of the capitalist market order. Throughout this text, three key aspects that exemplify the pervasive nature of this principle have been examined: free wage labor, limited liability companies, and market exchange. Each of these facets reveals how the relief of responsibility is deeply woven into the fabric of market societies, shaping their dynamics and challenges.

Free wage labor, a defining feature of capitalism, historically showcases the employer's reluctance to bear responsibility for the well-being of their workers. Despite legal regulations and social safety nets introduced by welfare capitalist societies to address this issue, the ultimate accountability for workers' living conditions is shouldered by the state. It is crucial to acknowledge that the relief of responsibility inherent in the structure of free wage labor necessitates societal commitment to offering support for those in need.

The establishment of limited liability companies has been a significant feature of capitalist economic development. While enabling rapid growth and accumulation of capital, this legal framework absolves company owners of personal responsibility for certain consequences. Instances of corporate misconduct or bankruptcy often shift the burden onto the state or society at large.

Market exchange, characterized by bilateral transactions aimed at mutual benefit, often shifts costs to society and creates societal risks and challenges that market mechanisms cannot adequately address. The emphasis on transactional benefits allows for the avoidance of full accountability for outcomes and impacts uninvolved *third parties* who receive no compensation for externalities. The widespread adoption of market exchange as the primary method of transferring goods underscores the systematic relief of responsibility in market-driven societies.

Moreover, the institutionalized relief of responsibility and its acceptance within market societies have been explored. Beneficiaries of the capitalist market order frequently exploit this relief, furthering their wealth accumulation at the expense of others. Ideological worldviews (Langman 2015) that highlight individual freedom and responsibility serve to legitimize this relief of responsibility for the privileged, while systemic challenges persist for others.

In conclusion, comprehending the relief of responsibility as a fundamental principle in market societies yields crucial insights into their operation and challenges. Although deeply embedded in the capitalist market order, addressing the relief of responsibility is essential for cultivating a fairer and more equitable society. By recognizing the implications of this principle, efforts can be directed toward promoting truly responsible entrepreneurship, overcoming a dominant business case perspective, implementing effective regulation, and developing economic systems that prioritize social well-being and sustainability.

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RESEARCH

Particularistic Solidarity? Explaining the Nordic Opposition Against the European Minimum Wage Directive

Martin Höpner* and Maximilian Kiecker**

Abstract

The European Minimum Wage Directive triggered the most bitter internal dispute in the history of the European Trade Union Confederation (ETUC), due to the fundamental opposition from the side of the Danes and Swedes. The article traces the Nordics' opposition to the directive and identifies two causes. The first cause lies in the – from a continental perspective – peculiarly low importance of legally enforceable individual labour law and the corresponding strength of collective rule-making. The second cause lies in the specific experiences that Denmark and Sweden had with European assurances that their collective models would be protected. In light of these findings, we deny that the attitudes of the Nordic trade unions testify, as suggested by Nussbaum Bitran and Dingeldey in issue 2023/2 of this journal, to a transnational solidarity deficit.

Keywords: Minimum wages; collective agreements; Minimum Wage Directive; trade unions; European Trade Union Confederation; Denmark; Sweden.

1. Counterintuitive fundamental opposition

In October 2022, the European Union legislator adopted the Directive on Adequate Minimum Wages,¹ for which the European Trade Union Confederation (ETUC) had lobbied intensively. The European trade unions have every reason to congratulate

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1 Directive (EU) 2022/2041, published in the Official Journal of the EU on 25 October 2022. An excellent account of the legislative process is Schreurs and Huguenot-Noël (2024).

themselves for their transnational unity and their success, one might think. In reality, however, Ursula von der Leyen's announcement in July 2019 that she was willing to present a legislative proposal for the coordination of minimum wages triggered the most bitter internal dispute in the history of the ETUC.

From the very start of the consultation phase, Swedish and Danish trade unions vehemently rejected both the idea of a Minimum Wage Directive and the ETUC's approval of the idea (Aranea 2022). Sweden's largest trade union confederation, LO,² boycotted ETUC meetings for several months and also temporarily stopped paying contributions. According to LO secretary Torbjörn Johansson, "you can't pay someone to kill you" (Nilsson 2021; our translation). The protests by the Nordic trade unions were not successful, however. They did not lead to a change in the ETUC's position, nor did they fluster the Union legislator. The final adoption of the directive did not end the dispute. On the contrary, at the insistence of the trade unions, the Danish government filed an annulment action with the European Court of Justice (ECJ) in January 2023, to the great displeasure of the ETUC and the governments and trade unions outside Denmark and Sweden. According to the Danish government, the European legislator had exceeded its competences.^{3, 4}

The process is not only important because of the significance of the directive. It also offers rich material for research on the European trade unions' ability and difficulties to reach common positions in the course of European integration. In issue 2023/2 of the *Journal of Political Sociology*, Ilana Nussbaum Bitran and Irene Dingeldey analysed the process from the perspective of the transnational solidarity orientations of the trade unions involved. According to the authors, the majority in the ETUC was guided by a universal form of solidarity, whereas the Danish and Swedish trade unions were guided by a particularised and therefore deficient form of solidarity. This result is remarkable: The majority, which pushed through its will despite the objections of a minority, ends up showing comprehensive solidarity, according to the authors. And the minority, whose objections were in vain and who now have to live with the consequences of a European regulation that they recognise as problematic,

2 LO (Landsorganisationen i Sverige) represents blue collar workers.

3 ECJ, C-19/23 (Denmark against EP and Council).

4 The directive is based on Article 153(1)(b) TFEU, which authorises the EU to legislate in the area of working conditions. The Danish government argues that minimum wages are excluded from the social competences of the EU legislator by the exception in Article 153(5) TFEU (more on this in section 5). The Danish government also argues that the legislator wrongly relied on Article 153(1)(b) TFEU with regard to the second matter of the directive, the coordination mechanism for collective bargaining: A suitable competence norm, they argue, is either not given or exists in Article 153(1)(f) TFEU, which deals with "representation and collective defence of the interests of workers and employers". Because the exercise of this competence norm requires a unanimous Council decision, a directive based on this norm could not have been adopted against the votes of Denmark and Sweden.

ends up with a solidarity deficit. In this article, we will trace the deeper causes of the conflict. This will lead us to a quite different conclusion.

The Danish and Swedish reactions are indeed counterintuitive. At first glance, they seem to be nativist (and perhaps irrational), which would at least be compatible with the diagnosis of a transnational solidarity deficit. Nobody doubts or denies that statutory minimum wages are a double-edged sword for trade unions. The advantages are obvious: Where collective agreements do not apply, minimum wages can be used to protect low-wage workers. But there are also disadvantages. The incentives to join trade unions could decrease.⁵ Employers could interpret minimum wages as wage targets instead of floors. Almost all experts as well as trade unionists agree that there is a latent tension between statutory requirements and collective bargaining autonomy (Adam 2022; Meyer 2016). Trade unions may therefore have good reasons to claim responsibility for enforcing good wages exclusively for themselves – if their power resources are sufficient. The best solutions from a trade union perspective must be determined from country to country and, if necessary, from sector to sector by carefully weighing the advantages that minimum wages offer against their disadvantages. There are no objectively superior standard solutions. Remember, for example, that German industrial trade unions hesitated to advocate for statutory minimum wages until the first decade after the turn of the millennium (Mabett 2016).⁶

In Denmark and Sweden, there are hardly any supporters of a statutory minimum wage (Eldring/Alsos 2012; Furåker/Seldén 2013). Almost all actors involved believe that the instrument is not a good fit for these countries. If the new directive required all EU countries to introduce national minimum wages, the vehemence of the Danish and Swedish resistance would therefore not be puzzling. But this is not what the Union legislator did. On the contrary, the directive imposes almost no adjustment requirements on Denmark and Sweden. Article 1 makes clear that the directive may not be interpreted in such a way that it obliges the introduction of minimum wages. Article 5 requires member states with statutory minimum wages to establish transparent criteria for determining minimum wage levels, without setting them themselves. The results are to be forwarded to the Commission. Countries without statutory minimum wages are not covered by these provisions.

With regard to the other matter of the directive, the measures to promote collective agreements, the overall picture is the same. Article 1 makes clear that the directive may not be interpreted in such a way that member states are obliged to make representative collective agreements generally binding. The obligations of

5 Critically: Kozák et al. (2024).

6 Within IG Metall, the favourable view of statutory minimum wages prevailed by 2007 at the latest.

the member states provided for in Article 4 only apply below collective agreement coverage rates of 80 per cent of employees. If such a shortfall exists, a process of very (!) soft coordination sets in: The respective member states have to draw up action plans to increase collective bargaining coverage, update these at least every five years and forward them to the Commission. The directive does not authorise the Commission to veto the action plans. Apart from the harmless nature of these provisions, it is difficult to understand what trade unions could have against a European measure pushing for better collective bargaining coverage rates.

Our article aims to contribute to an understanding of the conflict.⁷ Before we analyse the reasons behind the Danish and Swedish stances in sections 3-5, we consider the argument put forward by Nussbaum Bitran and Dingeldey in more detail and justify our approach on this basis.

2. Particularistic solidarity as the cause of a divergent preference for European legislation?

“Which forms of solidarity have been enacted by whom?” is the central question posed by Nussbaum Bitran and Dingeldey (2023: 7). Addressed here is solidarity as a disposition to act. The concept is not controversial between the authors and us: It is about the willingness to coordinate action while accepting (short-term, manageable) losses, in order to enable all parties involved to gain in the long run. The decisive point in this concept is the motivational willingness to make short-term sacrifices (ibid.: 9).⁸

In the conflict over the European regulation of minimum wages and collective bargaining, the actors operate in a multi-level constellation. Solidary orientations can be directed towards different levels. If a trade union pursues goals that only benefit employees in its own country, Nussbaum Bitran and Dingeldey speak of particularistic solidarity. In contrast, inclusive solidarity is given if there is a willingness to make sacrifices in the service of employees in other countries or in the service of a common, European public good (ibid.: 12). In the multi-level constellation, solidarity is particularly demanding. According to the authors, it requires *bridging and bonding* exercises to build, protect, and exercise transnational solidarity.

7 In the background of the article are around 60 semi-structured interviews conducted by one of the authors – Maximilian Kiecker – in 2021-2023 as part of a doctoral project with practitioners in Denmark, Finland and Sweden as well as with representatives of Union level institutions and organisations.

8 Solidarity can also be conceptualised as a structural term. In this sense, groups, organisations or societies are solidaristic if they have institutionalised processes that promote the described dispositions to act.

Contrary to what one might expect from the theoretical part of their article, however, the authors do not analyse empirically to what extent and why the Nordic trade unions feared a collision between the European regulation advocated by the ETUC and their models of industrial relations. Such an analysis would shed light on whether a transnational give-and-take might have had a prohibitive price for them: a potential decline in their own ability to organise. In that case the European regulation would not have made everyone involved better off in the long term. The authors also do not specifically analyse whether the changes to the directive made during the consultations, which they qualify as *bonding*, were really in line with Nordic concerns.

Instead, the attribution of different forms of solidarity on the part of the majority and the minority in the ETUC is based on a different indication: Inclusive solidarity is present when common European regulation is favoured; particularistic solidarity is present when the corresponding regulation is rejected. "Commitment to more transnational regulation / European cohesion", the authors write explicitly, is evidence of inclusive solidarity (see the entries in Table 1 on p. 13). Because the Nordics rejected the directive, the authors write: "With regard to this issue they remained loyal with a particularistic idea of national solidarity" (ibid.: 24). According to them, the Nordics not only lacked inclusive solidarity, they also "also held up a position of negative integration" (ibid.: 20).⁹

We doubt that the degree of solidarity of collective actors can be gauged by whether or not they are in favour of European regulation in social matters. If it were that simple, forms of solidarity could simply be read off the voting behaviour in the ETUC bodies (or, if we shift the focus from trade unions to political actors, in the EU bodies) - without having to undertake further analyses of the consequences of regulation hoped for or feared by the actors. In general, the identification of solidarity with joint regulation presupposes that European solutions are always superior to autonomy-friendly solutions, i.e. that they are more productive for everyone in the long term, despite any short-term losses suffered by some of those involved.

But why should that be the case? Does regulation maximise the cumulative benefit for all parties involved simply because it is based at European level? There is no obvious reason for this. If we shift our focus to national configurations, the problem becomes clearer. No one would claim that the partial transfer of powers from municipalities to the national level would per se have beneficial effects for

9 In political science theories of integration, positive integration refers to the adoption of common market-shaping rules at European level, while negative integration refers to the removal of actual or perceived market barriers at member state level (Scharpf 1999). While positive integration relies on the activation of the Union legislator and is therefore susceptible to veto, negative integration can take place not only through Union legislation, but also by way of *integration through law*, i.e. through rulings by the ECJ.

all. Consequently, it is hardly possible to draw any conclusions about the solidarity orientations of the municipalities from their support for the transfer. In order to clarify the latter, one would have to analyse the effects expected by the actors. As Nussbaum Bitran and Dingeldey proceed, they proactively read the actors' orientations into their support or rejection of the directive under discussion. We are not convinced by this.

In the following, we will therefore take a different approach and trace the causes of the Nordic rejection of the Minimum Wage Directive. The guiding question will be whether the Danes and Swedes had understandable reasons for their objection that a Yes to the directive may impose prohibitive costs on them. It is not a question of deciding from the outside whether European regulation of minimum wages and collective bargaining is desirable or not. Rather, it depends on the perception of the Nordic trade unions, which in turn is shaped by their experiences with the history of European integration, especially with the history of European internal market and social integration. In order to reveal the problems inherent here, it will be necessary to examine the complex implications of the directive in terms of European law, in addition to a detailed examination of the characteristics of the Danish and Swedish models of industrial relations.

Our findings will differ significantly from those of Nussbaum Bitran and Dingeldey. We will conclude that the Nordics had quite understandable reasons for their rejection. We will argue that, from the perspective of the European trade unions, the battle over the minimum wage directive was essentially a zero-sum conflict, with no prospect of mutual gains through give-and-take solidarity. We will also deny that the Nordic trade unions are in favour of negative integration. With regard to the status quo, it should in addition be emphasised that the Danes and Swedes were not in a veto position. They could not make the legislation fail, neither in the ETUC nor in the Council. On the contrary, they were outvoted, their objections were disregarded and they now have to live with the uncertain consequences, which we will discuss in detail. Against this background, the accusation of deficient solidarism on the part of the Nordics seems particularly questionable to us.

3. Labour relations in Denmark and Sweden

The difficulties in reconciling the trade unions' positions on the Minimum Wage Directive result from the heterogeneity of industrial relations in the European Union (Höpner and Schäfer 2012). At first glance, two features of the *Nordic model* represented by Denmark and Sweden stand out. The first is the high level of unionisation. In both countries, around two thirds of employees are unionised. This is supported in particular by the *Ghent model*, in which the trade unions take a strong role the administration of unemployment insurance. The strong organisational power of the

trade unions and an extensive right to strike lead to an above-average collective bargaining coverage, which currently stands at around 82% in Denmark and 90% in Sweden (Kjellberg 2022).

A second special feature of the two countries is that the high coverage rates are maintained despite the absence of state support measures. In various continental countries, such support exists in the form of statutory bargaining extensions (SBEs); in other cases, there are compulsory memberships in employers' associations or constitutional *erga omnes* guarantees.¹⁰ The absence of such direct support gives way to a constellation in which the trade unions receive indirect support from the particular way the welfare state is organised, but remain ultimately responsible for protecting the high levels of membership and collective bargaining coverage. Ozols et al. (2024) see the combination of these two characteristics, which can only be found in Denmark and Sweden in the EU¹¹ - Finland deviates here because it has SBEs (Günther 2021: Ch. 7) - as the main reason for the Danish and Swedish trade unions' rejection of the directive. This is because if there is direct state support for collective agreements, trade unions have less reason to fear that minimum wages will cause collective bargaining coverage to collapse.

We agree that the high Scandinavian coverage rates of collective agreements in the absence of state support are important to understand the attitudes of Danish and Swedish trade unions. In addition, however, we argue that this explanation does not sufficiently illuminate a fundamental background factor: the, from a continental European perspective, peculiar weakness of individual labour law enforceable in courts. In Denmark in particular, statutory labour law is traditionally sparse and focuses largely on specific groups of employees as well as on occupational safety issues; we will come back to more recent developments below. Collective regulation by the bargaining parties takes the place of statutory individual labour law (Andersen et al. 2014; Kjellberg 2022). Where statutory regulations exist, they are often dispositive, that is, they allow for deviations at collective agreement level. The resulting room for manoeuvre is used extensively by the social partners and allows wages and working conditions to be tailored down to firm level, depending on the respective needs.

The social partners are also responsible for monitoring compliance with the collective agreements. If conflicts arise, they are usually not resolved by ordinary courts, but by arbitration proceedings that are codified in the collective agreements

10 A constitutional *erga omnes* guarantee exists if the generally binding nature of representative collective agreements is not established politically, but is enforced by the courts on the basis of a corresponding interpretation of constitutional law. This is the case in Italy.

11 The combination of high collective bargaining coverage and low direct state protection can also be found in Iceland and Norway, which however are not members of the EU.

(Bruun/Malmberg 2004; Jørgensen 2010; Kristiansen 2015). This mechanism is based on *collective* rights: Employees are not litigants themselves, but rely on their trade union for enforcement. Only if no agreement is reached in the arbitration proceedings does the case go to a labour court. Sweden largely reflects this dominance of collective regulation and enforcement (Bruun/Malmberg 2004: 34).

But even where conflicts are brought before the labour courts, we are still not in the continental setting with which most readers are familiar. This is because the Nordic labour courts are not ordinary public courts, but are largely owned by the social partners, who have the right to appoint judges and act directly as plaintiffs on behalf of their members (Kjellberg 2022). These courts have sole jurisdiction over the interpretation of collective agreements. This conflict resolution model is highly regarded by both employers and trade unions and avoids the high costs and lengthy negotiations associated with ordinary court proceedings.¹² Collective labour law thereby offers a strong incentive to organise in trade unions. Firms are interested in quick and cost-effective conflict resolution, too, which in turn increases the willingness of employers to organise. In Denmark in particular, the low level of legalisation of the system is often seen as the basis for the trust-based negotiation orientation of the collective actors (Kristiansen 2015; Larsen et al. 2016: Ch. 7).

The fundamental opposition to the Minimum Wage Directive is fuelled by the fear that this high degree of self-regulation in the shadow of the state will be disrupted. Trade unions fear that the Minimum Wage Directive could ultimately lead to an individual right to minimum wages. If unorganised employees take legal action, if these cases end up before the European Court of Justice (ECJ), and if the ECJ recognises the corresponding legal claims of individual employees, Denmark and Sweden would have practically no choice but to either resort to the SBEs rejected by all parties involved or to introduce a statutory minimum wage.

The trade unions would then be exactly where they do not want to be: Individual rights would be strengthened at the expense of collective bargaining autonomy and the incentives to join trade unions would be weakened by the improved protection of non-organised outsiders. In Denmark, there are also fears of a strengthening of yellow unions, which have gained massive strength during the last decade through the reform of the Ghent model (Ibsen et al. 2013). They recognise more enforceable individual rights as a power resource and have repeatedly attracted attention due to their willingness to take legal action. In short, the Danish and Swedish trade unions fear an erosion of their collective regulation and conflict resolution model.

12 The Danish trade union 3F estimates the savings of this system in its bargaining area compared to ordinary jurisdiction in 2018 at 134 million euros (internal 3F document, available from the authors).

This point reveals a reasoning error on the part of Nussbaum Bitran and Dingeldey (2023). In the Commission President's original announcement, the Minimum Wage Directive was intended to deal exclusively with minimum wages. The authors see the addition of the provisions on collective bargaining as an attempt to reach a fair compromise by the means of *bonding* - as "an 'offer' made by the ETUC and the Commission to the Nordic trade unions, taking into account their self-interest" (ibid.: 21). This may hold true for the Finnish trade unions, for whom the new provisions may have implied an additional (albeit redundant) safety anchor for their SBEs. The Danes and Swedes, however, *fear* that an individual-right interpretation of the directive could impose undesirable SBEs on them. For them, therefore, the addition of the bargaining aspects to the directive did not signal concessions on the part of its supporters. On the contrary, for them it was an additional threat and, therefore, a further radicalisation of the directive.

4. The Nordic experience

But how realistic is the erosion scenario feared by the Nordic trade unions? How understandable are their objections? As described in section 1, the wording of the directive does not give Danish and Swedish employees any individual right to a minimum wage that they could invoke before courts. The legislative act does not impose more than minor reporting obligations regarding collective bargaining coverage on Denmark and Sweden. Social Affairs Commissioner Nicolas Schmit and European Parliament rapporteur Agnes Jongerius have repeatedly made assurances that nothing else is intended (Axelsson 2022). And indeed, the Danish and Swedish trade unions do not believe that the Commission is pursuing the hidden goal of imposing minimum wage laws on them. Rather, their fears relate to European case law.

The ECJ has been described as the engine of integration, that is as a court that ongoingly and creatively maximises the normative content of European law (Höpner/Schmidt 2020). The Minimum Wage Directive was communicated as one of several implementation steps of the European Pillar of Social Rights proclaimed in 2017.¹³ This is also explicitly stated in recital 5 of the directive. The Pillar does not operate in the language of European legislative proposals - it cannot, because most of the issues it addresses are outside the competences of the Union legislator - but in the language of individual rights. Accordingly, Principle 6 of the Pillar states: "Workers have the right to fair wages [...]. Adequate minimum wages shall be ensured [...]." The Pillar is also intended to serve as a guideline for the realisation of fundamental European social rights. These rights are codified in Chapter IV of the European Charter

13 Recitals serve as interpretative aids for courts.

of Fundamental Rights, where Article 31 contains an individual right to dignified working conditions. Recital 3 of the Minimum Wage Directive explicitly refers to this article. The possibility of an ECJ interpretation of the legislative act in the light of the Social Pillar and the Charter of Fundamental Rights, which ultimately postulates new individual rights, therefore does not seem far-fetched (see also Sjödin 2022: 290).

This brings us to the heart of the problem. The Danish and Swedish trade unions doubt the reliability of the assurances made to them. They see their doubts confirmed by their experience with European integration, which they perceive as a series of broken promises. After the Danes rejected the Maastricht Treaty in an initial referendum in 1992, the country was granted concessions in the Edinburgh Agreement. In this context, the then Social Affairs Commissioner Pdraig Flynn gave a written guarantee that Denmark would be allowed to retain its social model based on collective agreements despite extended European social competences: Nothing should stand in the way of implementing labour and social directives via collective agreements instead of legislation. Around the same time, Finland and Sweden applied to join the European Community. The Swedish government asked Commissioner Flynn for similar assurances and received them before accession was finalised in 1994 (Ahlberg 2010; Bengtsson 2017: 168).

Things turned out differently. In the course of the 1990s, the Community legislator began to engage with individual labour law and adopted, among others, a Working Time Directive, a Parental Leave Directive and a Part-Time Work Directive.¹⁴ Nordic governments and social partners learnt that the Flynn Guarantee had a short half-life. The conflict particularly flared up in the course of the Danish implementation of the Working Time Directive: The Commission threatened to take Denmark to the ECJ because, despite a coverage rate at that time (as today) ranging between 80 and 90 per cent, it perceived an implementation via collective agreements as insufficient (Leiber 2005: 126). In view of the risk that the European highest court might declare the Danish implementation method to be altogether unlawful, the Danish government gave in and adopted supplementary legislation in consultation with the social partners. As a result, the European directives have led to legislation gaining more influence over the formerly collectively bargained labour conditions (Kristiansen 2015).

In several cases, Nordic trade unions also perceived ECJ rulings as damaging to their social models. The most serious case, which continues to have an impact until today, was the *Laval* ruling from 2007.¹⁵ It was directed at Sweden. The ECJ interpreted

14 Directive 93/104/EC, published in the Official Journal of 28 November 1992; Directive 96/34/EC, published in the Official Journal of 20 August 1994; Directive 97/81/EC, published in the Official Journal of 20 January 1998.

15 ECJ, C-341/05 (*Laval and Partneri Ltd*).

the mandatory labour standards listed in the Posting of Workers Directive, which are to be imposed on posted workers, as maximum standards. On this basis, the ECJ qualified an industrial action aimed at enforcing the application of local labour standards as a disproportionate interference with the freedom to provide services, and therefore as a violation of European law. In the Nordic countries, whose social models are the result of an extensive interpretation of collective bargaining autonomy, judicial checks on the proportionality of labour disputes had been unknown until then. The ECJ judgement came largely unanticipated and resulted in restrictive interventions in the Swedish right to strike, described by Seikel (2015: 1175-1177) as “regulatory surrender”, and also led to conflicts between the social partners in Denmark (Arnholtz/Andersen 2018). It is therefore particularly far-fetched to assume, as Nussbaum Bitran and Dingeldey (2023: 20) do, that the Danish and Swedish trade unions are in favour of “negative integration”, of which the *Laval* case is an example. Rather, the Nordic trade unions are the crucial victims and the staunchest opponents of this form of integration.

In light of these experiences, it becomes understandable why the Danish and Swedish trade unions are sceptical, even suspicious, of the guarantees given to them. They fear that, despite all the sincere assurances, they will ultimately be overrun by court interpretations of the directive. The individual rights language of the Pillar of Social Rights and the reference to fundamental social rights in the recitals of the Directive could serve as a starting point for this.¹⁶ An ECJ ruling would actually not have to administer the introduction of minimum wages *contra legem*. Recognising an individual right, without specifying how it is to be taken into account, would suffice and would ultimately leave Denmark and Sweden with the choice between statutory bargaining extensions and statutory minimum wages.

If one aims at understanding the attitudes of the Danish and Swedish trade unions, one should not concentrate on quantifying the probability of this outcome occurring. Rather, the decisive factor is their perception: In the shadow of Flynn and Laval, Danish and Swedish unions are keen to avoid past mistakes. They have learnt that it is questionable “whether the promises you get from politicians in phase one or two (...) hold up at the European Court of Justice”, as one interviewee put it. With “Laval as a Freudian nightmare at the back of our heads” they are aware “that every uncertainty could turn out to be a big problem when it comes to the European Court of Justice”. The Swedish and Danish trade unions see the European train threatening to collide with their collective models.

16 Another connecting factor could be Article 12 of the directive, which provides for an individual right to legal remedies.

5. Conclusion: No Nordic solidarity deficit

We hope that the previous sections on the characteristics of the Danish and Swedish social models and on the specific experiences with guarantees addressed to Denmark and Sweden have made the existence and vehemence of the trade unions' resistance to the Minimum Wage Directive more understandable. Our aim was not to qualify the Danish and Swedish positions as *right* (or *wrong*). Rather, we aimed at shedding light on the background of their perceptions. In view of their experiences with European law, the Danish and Swedish reactions have at least a comprehensive internal logic. They do not reflect a lack of solidarity, but rather a concern that the architects and supporters of the directive did not take sufficient account of the characteristics of their social models. If solidarity is based on a willingness to empathise with the perceptions of partners, then the minorities in the ETUC and Council have at least as much reason to question the solidarity exercised by the majority as the other way around. As a result, we propose that the one-sided diagnosis of a lack of transnational solidarity among Nordic trade unions made by Nussbaum Bitran and Dingeldey must be rejected. It is a misdiagnosis.

Other cases of non-congruent European policy preferences of European trade unions could undoubtedly be cited, which nevertheless did not lead to comparable upheavals in the ETUC. It is fair to say that the disputes with the two Nordic trade unions escalated beyond an unavoidable level. Many of those involved described the Swedish boycott of ETUC meetings and the temporary suspension of dues payments in particular as overreactions. To put it bluntly, the Nordic trade unions did not behave like organisations that were outvoted but like organisations that felt betrayed. As with the analysis of the reasons for the exceptional forcefulness of the Danish and Swedish objections to the directive, we will refrain from making any judgements or even taking sides. However, it may be worth asking about the Danish and Swedish perceptions with regard to this as well.

In the perception of the Nordic trade unions, it was not them but their continental sister unions that had cancelled a previously shared consensus. Until the announcement of a legislative initiative in 2019, trade union attitudes towards minimum wages were held together by formulaic compromises. As Seeliger (2017: Ch. 5) describes in detail, transnational trade union debates on minimum wages can be traced back to at least early in the first decade after the turn of the millennium. As the ETUC was of the opinion that the social competences of the European legislator exclude minimum wage determination, announcements on the subject merely served to coordinate the lobbying of member unions vis-à-vis their respective member state governments (see, for example, the wording of the Athens Compromise from 2011, documented in Seeliger 2017: 75).

All parties involved were able to live with this, without having to position themselves in favour of or against action by the Union legislator. The announcement and

drafting of a proposal for a directive destroyed the formula compromise, as the trade unions now had to take a stand on the prospect of a legislative act as well as on the individual regulations envisaged. From the perspective of the Nordic trade unions, it was therefore the supporters of the directive who changed their position. They found it all the more irritating that their continental sister unions were not prepared to advocate an *opt-out* regulation for Denmark and Sweden, which would have been possible in principle. Such solutions were also proposed by Scandinavian MEPs, in particular by the current *LO* candidate for the European elections, Johan Danielsson. However, they failed in the European Parliament. It is no coincidence that the Swedish boycott of the ETUC began about a month later.¹⁷

Another irritation was (and continues to be) even more fundamental. The repositioning of the ETUC was only possible at the price of a reinterpretation of the Union's competences in labour and social law. Recall the reactions to *Viking*¹⁸ and *Laval*. At that time, there was a consensus among European trade unions that the exception in Article 153(5) TFEU, according to which pay, the right of association, and the right to strike are excluded from the social competences of the European legislator, should be interpreted *broadly*. The idea behind this was that the ECJ should not be allowed to transform in the name of fundamental market freedoms (= negative integration!) what is excluded from Union legislation for good reasons (see the details in Rödl 2018: 42-49).

The Yes to the Minimum Wage Directive, however, required (and continues to require) a *narrow* interpretation of the exception, and a correspondingly broad interpretation of paragraph 1(b) of the same TFEU article, which authorises the Union to legislate in the area of working conditions (the competence norm on which the directive is based). Given the circumstances discussed in our article, it is not surprising that the Danes and Swedes are alarmed by this new interpretation: For them, a broadly defined Union competence in collective labour and social law would clearly be outside the basis of their EU membership.¹⁹ Indeed, even if the ECJ does not introduce an individual right to a minimum wage by judicial fiat, a wide interpretation of union competences would allow the legislator to introduce such a right in a future

17 See EMPL Committee Meeting 11 November 2023, final proposal: "Oral Amendmend 432: Member States where there are no statutory minimum wages or systems for declaring collective agreements generally binding, where minimum wage protection is provided exclusively by collective bargaining between autonomous social partners, shall have the option not to apply this Directive, either totally or in part, provided that the social partners at national level jointly demand this, provided that they represent a joint collective bargaining coverage that comprises a majority of the work force on national level."

18 ECJ, C-438/05 (*Viking Line*).

19 „I think it's a problem because it is against the treaty, we think so. And what could be the next (proposal) when you have this? What about our pension system?“, says one interviewee.

revision of the directive ECJ. This also makes understandable why Denmark wants the ECJ to clarify the normative content of Article 153(1)(b) (Kiecker 2022).

Could the conflict have been avoided with more solidarity on *both* sides? May a lack of willingness to consider the experiences, perceptions and interests of the respective other side have left a compromise line undiscovered that would have put both sides in a better position? We conclude that this must be answered in the negative. Essentially, one side wanted to see the Union's competences extended to minimum wage issues and wanted to activate the European legislator accordingly, while the other side wanted to prevent precisely this. It is not due to a lack of solidarity that this is a zero-sum conflict. Note that the adoption of the directive resulted in an extremely asymmetrical constellation to the detriment of the supposedly non-solidaristic Nordics: As long as the directive is interpreted softly, it promises mainly symbolic gains for the ETUC majority and has at best no impact on Denmark and Sweden. However, if the provisions of the directive are interpreted in terms of individual rights, the Nordics have to fear that this may shake the foundations of their social models.

As a last question, we might ask whether it would not at least have been possible to prevent the *level* of conflict from escalating to such an extent. We can only speculate on this. It may have been possible to reduce the level of escalation if the majority in the ETUC had agreed to the demand that the directive either include an opt-out clause for Denmark and Sweden or take the path of enhanced cooperation under Article 20 TEU, which would have excluded the two Nordic countries from the scope of the directive from the outset. The Commission and the EP would very probably not have followed these demands, the same holds true for the Council. Differential integration is usually only favoured in speeches and theoretical considerations, but not in practice. The ETUC majority would probably not have achieved anything in legislative terms with such a proposal (nor would it have caused any damage), but internally an important signal would have been sent: Colleagues from Denmark and Sweden, we understand your problem.

Even if the Union legislator had followed the ETUC demand postulated in our thought model, the conflict would nevertheless not have been fully solved. This is because enhanced cooperation requires the presence of an adequate competence norm, too – a presence which Denmark and Sweden fundamentally dispute. The diversity of the labour and welfare systems within the European Union places irretrievable limits on the ability to reach common positions among trade unions (see also Seeliger 2018: 432).

For a European umbrella organisation of trade unions, which is supposed to promote coordination and cooperation between the member unions, this is an unpleasant insight. In such constellations, it can only concentrate on keeping the resulting damage to a minimum. In the context of rapid changes in the Union's fields

of activity – and in view of members that may soon include Albania and later Ukraine – frictions become more likely to occur. A great deal of tact, understanding for different perceptions and, where necessary, a willingness to find differential, autonomy-protective solutions will be necessary to preserve the (modest, but nevertheless significant) coordination capacity that has been achieved so far. This, in our view, is the decisive lesson to be learnt from the ETUC's Minimum Wage Directive saga. It implies that favouring European regulations does not necessarily testify to inclusive, transnational solidarity, contrary to what Nussbaum Bitran and Dingeldey (2023) have argued. Transnational solidarity can also consist of protecting autonomy.

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RESEARCH

Contentious framings: Swedish civil society actors' experiences of hate speech, threats, and harassment from multiple perpetrators

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Abstract

This article explores civil society actors' framing of hate speech, threats, and harassment in relation to the type of harasser or perpetrator. The article draws on a qualitative study with elected representatives, paid employees, and volunteers in different Swedish Civil Society Organisations and social movements. The phenomena are analysed from a relational perspective and theories of civil society as a contentious space. The article offers a complex picture of different framings related to multiple perpetrators; from anonymous senders and organised crime members to counter movements. The findings show the sectoral, legal, and moral boundaries that are drawn between victims and perpetrators.

Keywords: boundary work, civil society organisations, harassment, hate speech, perpetrators, relational perspective, social movements, threats

1. Introduction

Civil society actors are victims of repression and violence worldwide and are subjected to different kinds of restrictions (see e.g., Juris 2015; Narang and Stanton 2017; Chaney and Sahoo 2020). Swedish civil society actors are no exception. A survey study on hate speech, threats, and harassment against Swedish civil society leaders shows that 1 in 3 leaders reported that they had been victimised. Female, young,

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and foreign-born civil society leaders (Scaramuzzino and Scaramuzzino 2021) and advocacy-oriented associations such as unions and political associations were more likely to be subjected to hate speech, threats, and harassment than other civil society actors. This patterns also apply to associations working with LGBTQ+ populations (Swedish Agency for Youth and Civil Society 2021) and civil society leaders advocating for issues concerning gender-based violence and sexuality (Scaramuzzino and Scaramuzzino 2021). The Swedish sports movement has faced other types of hate speech, threats, and harassment such as hooliganism and match-fixing, both of which are strongly connected to men's sports and organised crime (Swedish Government 2013; Scaramuzzino 2023; see also Marchetti et al. 2021 for Brazilian sports; and Van Der Hoeven et al. 2020 for Flemish sports).

Hate speech, threats, and harassment against civil society actors is an ongoing phenomenon recognised by scholars. Previous studies have focused on the consequences of hate speech, threats, and harassment for individuals, organisations, and societies (van der Borgh and Terwindt 2012; Ploszka 2020; Nilsson 2020; Scaramuzzino 2023). There has been extensive focus on the different kinds of victimisation (Carmichael and Karamouzian 2014; Narang and Stanton 2017; Scaramuzzino and Scaramuzzino 2021). Most studies tend to focus on, for example, either social media "trolls" (e.g., Lundberg and Laitinen 2020), right-wing extremists (e.g., Manthe 2021), anarchists and autonomists within the radical left-libertarian movement (e.g., Jämte and Wennerhag 2019; Jämte et al. 2020) or armed groups (e.g., Narang and Stanton 2017). The Swedish youth movement has mostly been exposed to hate speech and threats by adults on social media (Nilsson 2020). Scholars have also brought attention to the use of political violence as a strategy for initiating political and social change (Juris 2015; Blee 2018; Gøtzsche-Astrup 2019; Frazer and Hutchings 2020; Jämte et al. 2020; Scaramuzzino 2023). Current research, accordingly, most often addresses either hate speech, threats and harassment as a general phenomenon targeting civil society, or it addresses specific forms of harassment carried out by specific perpetrators.

Our article instead departs from the fact that hate speech, threats, and harassment can target Civil Society Organisations (CSOs) in different forms, the threats can come from different actors, and there can be multiple perpetrators or harassers (see della Porta 2013; Lundstedt 2021). The aim of the article is to explore society actors' experiences of being targeted by hate speech, threats, and harassment and the way in which they frame different types of perpetrators. The focus is on the meaning given to these experiences by the civil society actors based on their relation to the perpetrator.

We draw on framing theory to address how collective action frames are constructed by elected representatives, paid employees, and volunteers as a shared understanding of the problem and who or what is to blame (cf. Benford & Snow 2000)

concerning the experience of being exposed to hate speech, threats, and harassment. We also adopt a relational perspective (Johansson and Kalm 2017; Santilli and Scaramuzzino 2022) exploring civil society as a multi-relational space where CSOs tend to interact with different actors across organisational and sectoral boundaries. The analysis is qualitative based on semi-structured interviews with 12 elected representatives, paid employees, and volunteers in different Swedish CSOs.

Through its relational perspective, the article contributes to scholarly discussions on the boundaries of civil society and what actors should be included in and excluded from the concept (Wijkström 1999; Chambers and Kopstein 2001; Alexander 2006; Gøtzsche-Astrup 2019; Sombatpoonsiri 2020). There is a tendency both in public debates and within research to only include the *good* actors in civil society; even if there are several examples of civil society actors who actively foster anti-democratic agendas (see e.g., Sombatpoonsiri 2020), or who are involved in illegal activities such as drug dealing, extortion, money laundering, or who engage in violence (Wijkström 1999). In this article, civil society is understood as a contentious civil sphere, consisting of both movements and counter movements; both *good* and *bad*, where hate speech, threats and harassment can be – but are not always – used for political and social change.

In contrast with much previous civil society studies (Juris 2015; Blee 2018; Gøtzsche-Astrup 2019; Frazer and Hutchings 2020; Jämte et al. 2020), this article does not exclude non-politically motivated violence. Instead, it acknowledges that violence and hate speech, threats, and harassment are broad concepts that can encompass everything from derogatory comments to physical violence (Scaramuzzino 2020; 2023) and include, for example, hate crimes, online hate speech, violent extremism, political violence, and work-related violence. There is often an overlap between these categories in the literature (Bladini 2017), which can create several methodological challenges for how the phenomenon can be studied and what conclusions can be drawn (see also Lundstedt 2021). Instead of departing from an a priori definition of the concept, this study is based on the interviewees' own understanding of hate speech, threats, and harassment and its different manifestations for the purpose of exploring different framings across sectoral boundaries and relations.

2. Civil society as a contentious civil sphere

2.1 Civil society, social movements and framing strategies

Many CSOs originate from social movements and could in fact be defined as social movement organisations. While a social movement can be defined as a “set of opinions and beliefs in a population which represents preferences for changing some elements of the social structure and/or reward distribution of a society” (McCarthy

and Zald 1977: 1217-1218), a social movement organisation is an organisation that identifies its goals with such preferences (ibid).

Social movement theorists have called attention to the ways in which collective actors engage in framing strategies mostly focusing on the issues and problems that they aim to address, in other words "...the processes by which grievances were constructed, contested and disseminated" (Snow et al. 2014: 30). Framing and frames have been studied extensively in social movement studies often as activities aiming at producing and maintaining meaning for constituents, antagonists and bystanders. Hence, it is reasonable to assume that when social movements activists are targeted by hate speech, threats and harassment these experiences need to be framed. Here concepts such as *boundary framing* and *adversarial framing* become relevant as processes of attribution that seek to delineate the boundaries between *good* and *evil* and *protagonists* and *antagonists* (Benford and Snow 2000).

Boundaries are, in fact, central when analysing the framing of perpetrators of hate speech, threats, and harassment and refers to the work civil society actors engage in when they attempt to create, shape, and disrupt different boundaries (Ho et al. 2021) which resonates with how boundary framings are understood in social movement studies (cf. Silver 1997). In particular we are interested in *legal* and *moral boundaries* outlining what strategies are considered legitimate or legal for civil society actors to use. These boundaries also have significance regarding who to include in or exclude from civil society (cf. Wijkström 1999; Juris 2015) as opposed to uncivil society (cf. Alexander 2006).

In the coming analysis we apply the concepts of *framing* for the process of constructing meaning to the experience of being targeted by hate speech, threats and harassment and *frame* for its output.

2.2 Civil society from a relational perspective

This article draws on a relational perspective and, as already discussed, it understands civil society as a contentious civil sphere (Alexander 2006), consisting of movements and countermovements, democratic and non-democratic actors, where hate speech, threats, and harassment can be used for different purposes, including the promotion of political and social change.

Within research on workplace violence, it is common to categorise violence based on the relationship between the perpetrator/harasser and the victim. It is often important to distinguish whether workplace violence has been enacted by someone outside (e.g., consumer violence) or inside (e.g., workplace bullying) the organisation (Waddington et al. 2006). The perpetrator – victim relationship is also crucial to understanding hate speech, threats, and harassment against civil society actors, because there can be different dynamics and consequences depending on the relationship. Furthermore, the relevant boundaries are not only the ones separating the

organisation from its environment. In fact, the relations between a CSO and its environment can be understood as multi-layered, and some boundaries might be less clear-cut. Some CSOs belonging to broader social movements might in fact be quite small and made up of only a few employees and a board, but belong to a larger movement of volunteers, supporters, activists, and constituents (McCarthy and Zald 1977). Figure 1 shows a theoretical model understanding a CSO as part of a movement, a civil society sphere, and a more general social sphere. Such a model allows us to distinguish what kind of locus and consequently relationship the perpetrator has to the CSO.

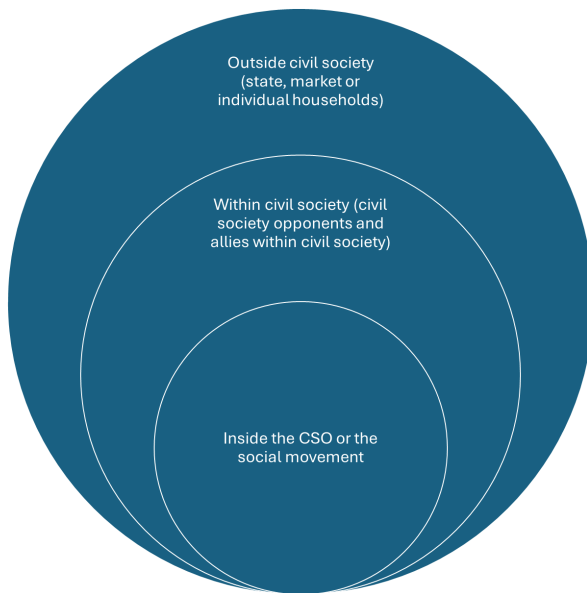


Figure 1. Locus of potential perpetrators

Such a sectoral relation perspective emphasizes the *sectoral boundaries* between societal spheres that determine who to include in and exclude from civil society (cf. Billis 1999; Salamon et al. 2004). Before delving into our own study, we will briefly explore how previous research has discussed perpetrators and harassers from different loci; i.e., outside civil society (outer layer in figure 1), within civil society (middle layer), and inside the CSO/social movement (inner layer).

2.3 Perpetrators outside civil society

There is a growing literature on shrinking civic space for civil society. Shrinking access to civic space for civil society has been mainly associated with authoritarian and

hybrid regimes (Toepler et al. 2020), but in recent years, repressive measures have also been used in some EU Member States, such as Poland and Hungary (Ploszka 2020). The literature focuses on how some governments and public authorities limit access to civic space by restricting some CSOs' possibilities to organise, to make their voice heard, or to act, through censorship, disrupting international funding, and/or setting up legal restrictions (cf. Buyse 2018; Pierson and Thomson 2018; Toepler et al. 2020; Ploszka 2020; Chaney and Sahoo 2020; Berger-Kern et al. 2021). After the 9/11 terrorist attacks, new policies and practices were quickly implemented in many countries to prevent financing of terrorism and future terrorist attacks, which also affected non-terror-related CSOs (van der Borgh and Terwindt 2012). Physical harassment and intimidation can also be used to restrict access to civic space for some civil society actors by attacking them when they are demonstrating; or by deciding not to protect them from other groups, or from taking action in response to physical attacks on activists or their offices (van der Borgh and Terwindt 2012; Ploszka 2020). In recent years, quite a few activists in the Philippines have also been murdered (Dressler 2021). However, there are fewer studies on hate speech, threats, and harassment from market-actors or from individual households. In a Swedish context, it is not expected that there would be much hate speech, threats, and harassment within these relationships.

2.4 Perpetrators in civil society

There is extensive research on perpetrators *within* civil society. In fact, civil society is contentious, and consists of both movements and countermovements (Ayoub and Chetaille 2017; Fillieule and Broqua 2020; Serbulo 2020; Kalm and Meeuwisse 2020; Cullen 2021), and the fact that there tend to be violent attacks within this particular relationship is not a novel observation. Throughout history, different types of political violence have been used within civil society as a strategy for political and social change (cf. Blee 2018; Jämte et al. 2020), which resulted in violent clashes between *pro*- and *anti*-groups and between protesters and the police (Serbulo 2020). Elizabeth Frazer and Kimberley Hutchings (2020: 1) argue that "...violence is intimately related to, but can also be sharply distinguished from, politics." The ways in which politics and violence are understood in relation to each other have implications for these justifications; i.e., in what situations different types of violence are considered legitimate. This means that how these concepts are understood also has implications for whether the actor who uses political violence should be regarded as a perpetrator or as a freedom fighter. Jeffrey Juris (2015: 415) writes about the use of "performative violence" in media coverage of the anti-G8 protests in Genoa in 2001. Performative violence is described as the enactment of symbolic rituals and modes of communication by staging confrontation and playacting violence to gain visibility in mass media (Juris 2015) and in social media. However, other scholars highlight how civil society

actors tend to reject the use of violence as a political strategy, because in certain contexts it is considered unwise and thought to undermine the movement and their message (cf. Gøtzsche-Astrup 2019; Scaramuzzino 2023).

Multiple civil society perpetrators have been mentioned in recent studies. Much of the focus has been on right-wing extremists (Colvina and Pisoiu 2020), extremist groups like Islamists (Chaney and Sahoo 2020), and on how to prevent radicalisation to violent Islamist groups (Holdo 2021). Research shows how civil society opponents also sabotage and manipulate other civil society groups. There have been several examples of social media trolling through creating fake profiles to infiltrate closed groups on Facebook and by hijacking social media accounts to create a sense of an “enemy within” or a “Trojan horse” (Johansson and Scaramuzzino 2022; Rone 2022: 31). However, in these cases it is often difficult to decide whether the people behind the sabotage are people inside the countermovement or people inside one’s own movement who want to extend their power (Rone 2022). Scholars have also discussed how aid workers or volunteers are, in some contexts, more often exposed to violence. There are, for example, several studies on violent attacks against aid workers in conflict zones, and in these cases the perpetrators are often armed groups (Carmichael and Karamouzian 2014; Narang and Stanton 2017). In a Swedish context, most hate speech, threats, and harassment are expected to occur in these relationships, and therefore most of the perpetrators are expected to exist within them.

2.5 Perpetrators within the CSO or social movement

When analysing the different relationships in which hate speech, threats, and harassment can occur, relationships within the CSO or social movement can be of relevance. Studies on workplace violence often focus on different types of violent acts that occur within work organisations, such as workplace bullying (Waddington et al. 2006). However, within civil society research, this perspective is almost non-existent. There are a few exceptions, including a study on sexual workplace harassment in NGOs in Pakistan, but the focus is on the victims and not on the perpetrators (Jalal et al. 2015). Another study focused on workplace violence against Italian volunteers in cardiology and oncology units and explores perpetrators’ characteristics. In this instance, it was often a patient or a relative/friend of patient who subjected them to workplace violence; but in some cases, it was a colleague (Acquadro Maran et al. 2018). The general lack of intra-organisation/movement perspectives can perhaps be explained by the strong emphasis on volunteer work, and the fact that CSOs have not been analysed as workplaces. However, according to Statistics Sweden (2019), of all employees in Sweden (5.1 million), 199,280 were employed in civil society. It is difficult to know what to expect regarding hate speech, threats, and harassment in these relationships due to the lack of previous research. When it comes to perpetrators within organisations in general, it is usually either co-workers or managers. As

discussed, this could also be someone from the target group, although it is uncertain whether they can be considered to be inside the organisation or not.

While we find that previous research exploring hate speech, threats, and harassment against CSOs has tended to focus on one of the three loci, we will address the phenomenon and its perpetrators by looking at how the actors frame their experiences of being exposed depending of the locus of the perpetrator.

3. Methods and empirical material

The article is based on a qualitative study that was carried out between March 2020 and June 2021. A qualitative method was chosen to capture interviewees' experiences of hate speech, threats and harassment and how they frame different types of perpetrators. This kind of in-depth analysis required a small sample. Twelve semi-structured interviews were conducted with elected representatives (chairmen and board members), paid employees (i.e., managers, project leaders), and volunteers in Swedish CSOs, as well as a representative of Swedish CSO security training, who had a broader understanding of the hate speech, threats, and harassment levelled against Swedish CSOs.

To contact interviewees from different types of Swedish CSOs, umbrella organisations were approached and asked whether any of their member organisations wanted to participate in the study. In parallel, a snowball sample was used to ensure that different types of CSOs were represented in the sample. Hate speech, threats, and harassment are sensitive topics. To protect interviewees' anonymity, any specific information about the CSOs and the interviewees will not be presented. The people included in the study were mostly women (8 women and 4 men) 20 to 80 years old. A majority had been or were active in several CSOs and had held different positions over the years. Most of the interviewees were active in local branches of larger organisations and movements in different parts of Sweden. The interviewees were active in, for example, religious communities, trade unions, sports associations, and advocacy organisations that worked on issues such as gender equality, violence against women, honour-based violence, sexuality, disabilities, children and youth, mental health, poverty, human rights, refugees' rights, education, and the environment.

Even though we purposefully included different types of CSOs in the sample, the aim of this study is not to provide a representative image of hate speech, threats, and harassment against CSOs. Rather we want to include as large a variety as possible of experiences of perpetrators which we assume is partly dependent on the type of CSO and social movement the interviewees represent, the position they hold, and the issues they address.

The interviews were conducted on the telephone or via video meetings and lasted between 45 minutes and an hour. The interviewees were asked questions

about whether they or their association had been subjected to hate speech, threats, or harassment; and, if so, by whom. A security training representative and two representatives from the sports movement who worked specifically to prevent hate speech, threats, and harassment and to assist associations in doing so, were asked specific questions about their general impressions of who exposes whom to hate speech, threats, and harassment, and how they worked on these issues.

The interviews were recorded, transcribed, and analysed for themes (cf. Nowell et al. 2017 for a more in-depth description of this study's methodology). We read the transcriptions several times to generate initial codes based on the relationship between the victim and the perpetrator/harasser; whether the perpetrator was inside or outside civil society; whether they were inside or outside the CSO; and whether the violence was initiated by individuals or by organisations. We then searched for recurrent themes focusing on the perpetrators and sectoral boundaries and found the following: 1) anonymous perpetrators; 2) civil society opponents/countermovements; 3) civil society allies and inside the CSO/social movement; 4) a political strategy within their own movement; 5) the people they meet and help; 6) organised crime members; and 7) public authorities and municipalities.

Figure 2 summarises the perpetrators described in the interviews in relation to sectoral boundaries:

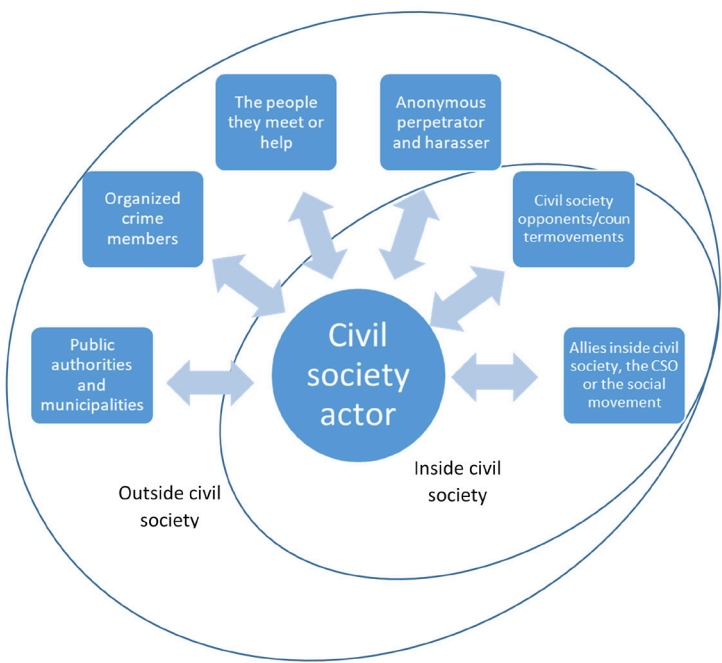


Figure 2 Multiple perpetrators outside and inside the civil sphere

Within each theme, different experiences of hate speech, threats, and harassment were highlighted to gain a multifaceted picture of the framing of the experience and of the perpetrators. In the empirical material, there were accounts about a wide array of different kinds of harassment; from degrading comments, slandering, and spreading rumours, to damaged property, sexual harassment, gun threats, and homicide.

4. Analysis

While our analysis distinguishes between different types of perpetrators, an important frame is that the phenomenon is very common and coming from different directions. For example:

Unfortunately, I have been subjected to threats several times. The picture is very complex. There are threats both from the ones we help (refugees), from right-wing extremists, and from Islamists. So, they come from three different directions. It is totally insane to be in this kind of situation. (Interviewee 8)

The situation of being targeted by multiple perpetrators is framed as *insane* to emphasise the situation as unbearable and possibly unacceptable.

4.1 Anonymous perpetrator: a human coward or an artificial intelligence/bot?

Framing of the experience of being subjected to hate speech, threats, or harassment tends to be affected by the identity of the perpetrator as will be discussed further on. Anonymous threats, however, tend to have their own framing process as the identity of the perpetrator and their relationship to the victim are unknown. For example, an interviewee described how they had been subjected to threats multiple times over the years and “it was anonymous, as always” and “they are cowards who act anonymously in this way” (Interviewee 7). The framing here emphasises on the one hand that it is a common occurrence to receive anonymous threats and on the other hand the moral boundary of cowardness of the perpetrator that does not reveal their identity.

The framing of anonymous perpetrators sometimes involved also an attempt of making sense of it based on other elements than the identity of the perpetrator. Drawing on the *modus operandi*, one interviewee who had received anonymous letters with the same handwriting presumed them being from the same sender. Sometimes the content was used in the framing to understand the motive of the perpetrator: “I have received anonymous letters and it appears that it is for a single purpose – that is that I should not help new arrivals” (Interviewee 8). The anonymity of the perpetrator was also framed as a consequence of social media: “It is hard to

know when writing a comment online. You might write that your name is Jörgen, and you live in Sörmland, but I do not know if it is true" (Interviewee 1).

In general, the anonymous perpetrator was framed as someone who does not dare to stand up for their opinions publicly. They were also framed as someone who spends a lot of time hating others, tapping into the general idea of social media being filled of haters and trolls. The anonymous perpetrator was not always thought of as human, rather framed as potentially artificial intelligence, or a *bot* that was behind the multiple threats. In this case, the framing involves a dehumanisation of the perpetrator. While sectoral boundaries are not so easily drawn when it comes to anonymous perpetrators and harassers, moral boundaries were drawn more easily; depicting the harassers as cowards, compulsory haters or even non-human.

4.2 Civil society opponents

The framing of opponents as perpetrators of hate speech, threats, or harassment was pointing at right-wing conservative groups and groups with a racist or/and anti-feminist agenda. For example: "the (internal) analysis was that it was right-wing extremists" (Interviewee 2), "...it has often been on this type of internet forum [which] gathers people with some form of Nazi background, if I may say so, and Sweden Democrats supporters¹ and so on" (Interviewee 4) and "I have been threatened at least ten times by right-wing extremists" (Interviewee 8). An interviewee said that a fellow unionist "was murdered by Nazis" (Interviewee 6).

Male perpetrators were also often part of the framing for instance according to an interviewee being exposed to hate messages from men, when they published something about menstruation. This interviewee also specifically mentioned how their organisation had been repeatedly approached by a countermovement who advocates against abortion:

When we have recognised international safe abortion day, we have received messages from – what are they called – Pro Life – I do not know what they are called in Swedish – with videos about how terrible we are. They send videos of anti-abortion movements and "this is what an abortion looks like" and they write to us that we are horrible, disgusting, and repulsive to be doing "this". (Interviewee 1)

In both cases the framing tend to emphasise the issue of gender (menstruation and abortion) as triggering the perpetrators against them. Another example of issue-related framing was connected to the issue of migration and integration: "some persons and organisations advocate that we should be labelled racists if we highlight

1 Sweden Democrats is a right-wing populist party.

where these bad customs (e.g., honour violence) come from." (Interviewee 8). The interviewee seems to frame this threat as aiming at limiting their possibility of expressing themselves concerning the issues they work with.

The framings were here often pointing at ideological conflicts (opposing views) rather than moral boundaries. Legal boundaries were brought up in the sense that it was sometimes difficult for civil society actors to decide when messages crossed the legal line and became hate speech, and thus marking the moment when their opponents became perpetrators. All messages could not perhaps be considered hate speech, according to the interviewee, because some of the messages were more along the lines of: "...is this something that you should spend your resources on?" (Interviewee 1).

These examples of framings are related to perpetrators within civil society from actors who hold opposing views. Perhaps because some level of conflict between opposing movements is considered a natural part of democratic debate, framing of moral boundaries were often hidden behind ideological conflicts. Framing of legal boundaries were also seldom used because the expressions mentioned by the interviewees, although clearly confrontative, were seldom framed as hate speech, threats, or harassment.

4.3 Allies inside civil society or inside the own CSO or social movement

Framing of perpetrators within the own CSO or social movement tend to follow a different pattern than those that we have seen so far. An experience of being exposed to a sexual comment from a partner of collaboration for instance was clearly framed as coming from *within*: "That person was also within civil society, and employed in another CSO" (Interviewee 4). Framing of perpetrators within collaborative networks could also involve representative from the public sector:

There were threats from politicians, who stated that if I continued to be visible, because I was often on TV and on the radio, and if I did not say that they also had contributed money, they would withdraw their (financial) contribution. (Interviewee 3)

As the quote shows, the interviewee framed the perpetrators as (ab)using the leverage given by public funding as a means of wielding power, and as a threat of loss of these grants.

When violence or harassment came from someone within the CSO or the same social movement, it was often framed as extremely difficult to handle. One interviewee, for example, described how there had been intense conflicts within the association where they were employed and that these conflicts had been going on for

years. It all started when the association received a large donation, and there were conflicts over how the money should be managed and spent: “a lady said that it was the money that they were arguing about, and she is probably right. If there had not been any money, no one would have quarrelled” (Interviewee 12). The conflicts resulted in board members and former board members writing *angry letters* to each other. According to the interviewee, some members also tried to get people that were *easy to control* onto the board, and the conflicts became so intense that someone resigned at the annual meeting. The interviewee described a situation rife with accusations, both written and oral, and how “the whole annual meeting was an attack on me – it was very unpleasant” (Interviewee 12). In this case, it is clear that the experience of being exposed to hate is framed as part of an internal democratic process that had derailed.

Framing experiences of hate speech, threats and harassment within the sports movement involved also discussing how to actively work to prevent bullying and conflicts:

They (sports associations) want to do their sport and, for example, swim and play ball or whatever it may be. But time after time, it turns out that there are shortcomings when it comes to management. They may run (the sports association) like their leaders did in the 1970s or 1980s and may not really see issues like democracy as the most important, and there may be some people who control and decide for the association. (Interviewee 10)

As the quote shows, in these situations the issues are framed as problems regarding how the associations are managed. It was heavily discussed that in most sports, kids are split early-on into gender-specific teams and changing rooms. For example, there were conflicts about what team or changing room individuals who are transgender or non-binary should join and use, and whether it is possible and desirable to create gender-neutral spaces or other alternatives for these kids. In Swedish there is a gender-neutral pronoun, *hen* (similar to “hir” or “they” as a singular gender-neutral pronoun), which also created intense conflict:

It may not always end up in threats, but harassment, and we have noticed that both children and young adults can be harmed by such conflicts. There have been several such cases recently. It was a football guy/football girl who did not really know where hir (hen) belonged and where this created problems in the association. I mean, should hir (hen) play with the boys or with the girls? (Interviewee 10)

While some examples here are clearly framed as internal management of organisations and movements (e.g., funding), some are also framed as related to the

norms that should prevail within the organisation (cf. Buyse 2018). In the case of hate speech, threats, and harassment coming from within the organisation or movement, boundary framings are much more difficult. While some framings can be related to moral boundaries associated with accepted norms, legal boundaries might be more difficult to draw on in the framings, especially when it comes to disagreements about management.

4.4 Political violence as a strategy within one's own movement

Framing violence as a political strategy within their own movement or movements with which they sympathised was often related to an increased polarisation between the *extreme left* and the *extreme right* over the years. One interviewee critically reflected on how a small group of anarcho-syndicalists had begun to use violence as a political strategy:

The anarcho-syndicalism movement have unfortunately used violence. This is not something I stand behind or sympathise with. It is some kind of self-destructive spiral that emerged in the late 1980s when the AFA (Anti-Fascist Action) was founded, and the Nazis began to take to the streets. (Interviewee 6)

In this framing the radical extreme left started to organise as a response to the growing number of Nazis. A similar framing of political violence within the own movement involved the radical feminist movement, targeting individuals and subjecting them to online hate speech and different types of hate campaigns. In the aftermath of the #MeToo protests, specific individuals were named and targeted: "The worst side of the #MeToo wave, or tsunami I would rather say" (Interviewee 6). Even if the strategies were framed as *for a good cause*, it was critical of using online hate speech as a political strategy:

On social media I see hate campaigns (...) I do not want to take part in hate campaigns. That hate campaign consists of feminists or human rights activists or people who are against human trafficking and all that. I am a little sad that that discussion cannot be kept more objective and neutral. (Interviewee 6)

As the quote shows, the strategies are not framed as "meaningful violence" (Juris 2015). Using hate campaigns as a strategy was instead described as only leading to increased polarisation. Moral boundaries are clearly drawn in this framing separating what was considered to be the goal of the movement, and the strategies employed to achieve it. To some extent, these moral boundaries tend to also produce organisational ones, as in some framings the issue of political violence was used to create a distance from movements interviewees actually sympathised with.

4.5 The people they meet or help

Another framing of being subjected to hate speech, threats, and harassment involved having the people that the civil society actors meet or try to help as the perpetrator. One interviewee explained that it was much easier to handle threats coming from the target group, compared to threats from other actors:

These people are often high and suffer from mental illness. But we have tools [to handle it]. It is a physical person standing in front of you. I have not worked so close[ly] with our participants, not in recent years at least. But it is understandable that there may be a conflict. They want something that we cannot accept, so they have to go for a walk and calm down. These situations are manageable, and we have the resources and tools to handle them, but not for handling the other [types of threats]. (Interviewee 3)

As the quote shows, the framing of the perpetrator is much more positive than what we have seen before. The conflict is framed as *understandable* and the hate, threats and harassment as *manageable*. Another similar framing involved the association receiving bomb threats when arranging a couple-strengthening activity in collaboration with social services:

It has happened that a person (service-user) who did not want to go to these meetings thought it was a very good solution to call and make a bomb threat, because "then they have to close, and I do not have to participate". It has happened on a couple of occasions. Once we figured out who it was who did this, that person was suspended from couple's counselling. (Interviewee 4)

Here we see a similar framing and the use of the ironic "a very good solution". All in all, also here the framing presents the threats as manageable through suspending the perpetrator.

In the framing of these kind of experiences, the sexual motives were also an element. Another interviewee described how they had received several phone calls with people moaning or making suggestive comments:

It was people who called and thought that they could get a date just because you were a little bit nice on the phone. This may not be considered a threat or hatred, but it can be quite unpleasant to be called on your private phone, when working on sexuality issues with filthy suggestions. From the calling person's own perspective, these suggestions may be perceived as nice: "Hello, do you want to go on a date?" But from my perspective it might not be nice. (Interviewee 2)

Also in this framing the perpetrator is depicted in a less negative way both morally and legally. Morally the assertion that the perpetrator might perceive the comments as *nice* make them less culpable. Also the statement that it “might not be considered a threat or hatred, but...” conveys the perception that it was not so serious.

In the framings presented so far, the motive of the perpetrator was not described as *political*, and arose more often out of different expectations, a vulnerable position, frustration, or because they held different values. However, some of the interviewees suggested that in some situations it was also political: “During election campaigns, some people bark at you, but that you have to put up with (...) It is important to be aware of that there are other people with different opinions. As long as they do not attack you physically” (Interviewee 7). The framing clearly depicts the episodes as something inevitable that the actor should “put up with”. The moral boundary is drawn when it comes to physical violence. An interviewee who lectured on disabilities described how they sometimes met pupils who had a bad attitude, but once “... afterwards, this guy came to me and apologised” (Interviewee 11). In this framing we find also an explanation of these episodes as happening out of ignorance. In this way meeting and talking to people could be framed as a way to change their attitudes, best exemplified by the person *apologising* afterwards.

All in all, the framing of hate speech, threats, and harassment coming from target groups seems to be related to very little boundary work. It seems that most actors, although condemning it, see handling these expressions as part of their mission. Boundaries are of course drawn organisationally, placing the perpetrators and harassers outside the organisation but within the target group for which the actors should be working. There are examples of moral boundaries (and possibly legal boundaries) being drawn at physical attacks.

4.6 Organised crime

A particular framing involved organised crime as a perpetrator in the interviewees’ accounts. More specifically, it referred to match fixing targeting the sports movement. Match fixing was framed as a clear threat to the Swedish sports movement, driven by economic interests: “criminality has entered sports because there is money to be earned” (Interviewee 10). In another instance:

I do not have any statistics...but it is often those who want to make money on a game, who make the threats (...) They (the police) have discovered that these (settled) matches have had connections with aggravated criminal groups, and also to some of the recent (gang) shootings. They (the police) know that these (gang shootings) have had to do with gambling and betting. (Interviewee 9)

In the framing of these episodes the element of economic gains is coupled with the element of serious violence in terms of shootings. The interviewee further explained that organised gang members get in touch and ask either referees or players to manipulate a match by taking a red card, giving a warning, or missing a goal, etc. If the referees or players refuse, they are threatened:

I have a horror story from a guy who worked...and on his way home he was abducted by two guys who first threatened him only by offering him money, and then he refused. A few days later they came back and then they had a gun. (Interviewee 9)

The framing of this kind of threats and harassment is clearly drawing both moral and legal boundaries emphasizing the gravity of the episodes. *Horror story* is used to reinforce this feeling when describing a situation of abduction, a clear reference to a violent crime. The presence of the gun makes the gravity in the framing as alarming understandable.

Part of the framing is also that the threats and harassment seem to occur at all levels of sports: “the crazy thing is that this does not only happen on the highest elite level (...) and in criminal circles they are not afraid to go far down in the league system” (Interviewee 10). According to the two interviewees, some sports are easier to manipulate without being caught, such as tennis, basketball, and e-sports, and overall, this phenomenon was probably more common in men’s sports, where there is more money to be made.

This particular type of perpetrator is not framed as targeting civil society in particular, but its capacity to infiltrate sports and athletics is framed as potentially a threat to Swedish civil society, as sports is one of the largest areas of activity in associational life. Whether the threat comes from inside or outside civil society is difficult to say. Moral boundaries are drawn as the means used by these organised crime members are framed as unacceptable and immoral. Legal boundaries are also drawn, as they are described as criminals. It is also clear that the organised gang members’ motives are framed as non-political, but rather financial – i.e., to make money, which would align them more closely with the business sector.

4.7 Public authorities

As we have already seen discussing collaborations, public authorities are also framed as perpetrators by some interviewees. An interviewee explained how they had to be very careful with how they expressed themselves, so that they would not risk losing public funding:

We are completely funded by grants now. We have some participation fees, but they are extremely small, so most is grant-financed. We notice that we have to defend our work in a completely different way today; for example to a municipality. We talk a lot about how it is a harsh debate and that our work is being questioned. How should we present the activities that we think are good, without clashing with a municipality where we, for example, know that there are politicians who are questioning why we work with, for example, multi-religiousness? Do we dare to talk about it then, or should we not include it? (Interviewee 4)

In this framing, politicians in the municipalities had questioned their work, and the threat of losing the grants was considered a threat to the mere existence as a CSO. The interviewee was also framing difficulties in collaborating with a municipality in a project for asylum seekers, as an issue of racism: “we notice a lot of racism, absolutely, and a lot of fears that if I as an official say yes to this – what are the consequences for me? (...) I think that is a big difference today compared to how it was five years ago” (Interviewee 4).

Another interviewee framed their experience as almost the opposite, where people within government agencies had labelled them *racists*, so they would not receive any public grants: “there are people who spread misinformation about what democracy is and what racism is” (Interviewee 8). According to the interviewee, the CSOs that they represented therefore had to be careful not to lose public funding, and as a result, they were caught in a vicious cycle of self-censorship in their efforts to receive funding.

In these framings, difficulties regarding what can be considered hate speech, threats, and harassment were most visible. When the perpetrators were representatives of public authorities, the threats were often subtle, sometimes expressed as more like a *hunch*, making it difficult to draw legal boundaries. Nonetheless, it was clear that the threats could in the framing of the interviewees have considerably negative consequences for the interviewees and the CSO they represented.

5. Discussion

This article shows how civil society actors' framings of being subjected to hate speech, threats, and harassment tend to vary depending on the locus of the perpetrator. Even though based on a small sample of CSOs the experiences tended to involve a large variation of types of perpetrators spanning from within the CSO and the movement, to allies, adversaries, politicians and organised crime.

It is interesting to notice that in the framing of these experiences moral and legal boundaries are drawn differently, depending both on the specific form of hate, threats, and harassment, as well as to the relationship with the perpetrator. The

discussion about *what* can be considered to be hate speech, threats, and harassment was constantly present in the interviewees' framings, i.e., when different opinions and harsh words turned to hate speech or threats, or when overly-friendly gestures crossed the line and became sexual harassment. In these cases, moral and legal boundaries were difficult for civil society actors to draw. Concerning the former example, critical speech is essential in the civil sphere and for democracy, but when it turns into hate speech or violence it becomes problematic, and an opponent becomes a perpetrator.

Even more clear is that *who* performs hate speech, threats, and harassment, i.e. the locus of the perpetrator plays an important role in how the experience of hate speech, threats and harassment are framed. When the perpetrator is anonymous or part of organised crime it seems that moral and legal boundaries are easier to draw. The anonymous hater is a coward or a bot while the criminal is by definition outside of the law and the moral order. Their actions become unacceptable and should not be tolerated. The former violates the idea of an open debate in the civic space while the latter violates the norms and values of civil society.

It is interesting to notice that also when it comes to hate speech, threats, and harassment from representatives of the public sector, clear moral boundaries are drawn. Even a threat to curtail public funding is framed as unacceptable, which can be related to a tradition of cordial state-civil society relations and a culture of advocacy informed by high trust and respect for each other's role and autonomy. In Sweden, many CSOs are dependent on public funding and on project funding, and there is an expectation that the state will be a guarantor of civic space and security for civil society actors, rather a threat to them.

It is interesting that the framing of ideological opponents tends to be less based on moral or legal boundaries. One possible explanation is that there is an intrinsic adversary relation between movements and countermovements that is drawn upon in the framing, making it natural that engagement based on specific ideologies and values might trigger reactions and opposition from other actors. In a sense it is, to a certain extent, part of the game and a contentious space as civil society.

One possible explanation is that the framing of the experience of hate speech, threats and harassment follows the CSOs understanding of its mission, of its position in society and its relation to other actors. For instance, it is clear that, when it comes to target groups, there seems to be a high level of acceptance from civil society actors concerning hate speech, threats, and harassment. This can of course be related to the actors' commitment to their mission, and to having a users' perspective in approaching the people they work for and hence downplaying the gravity of these episodes in their framings.

When hate speech, threats and harassment comes from within the movements or the CSO there seems also to be a common commitment to a cause and a form

of camaraderie which makes workplace bullying and sexual harassment sometimes difficult for interviewees to define and frame based on moral or legal boundaries. The article also highlights critical elements in the framing of hate speech, threats, and harassment used as a political strategy within the own movements. Also here we see reference to civil society as a contentious space where sometimes, in the heat of the confrontation between opposing ideals, the moral or even legal boundaries are difficult to draw when it comes to hate speech, threats, and harassment.

As this study shows, it is important to have a relational approach for understanding the way in which CSOs and social movements experience and frame hate speech, threats, and harassment as the phenomenon is not unambiguous and is interpreted differently depending on one's relation to the perpetrator.

6. Conclusions

Awareness has been raised on hate speech, threats and harassment as a potential threat to mobilization in civil society and democracy. The discussion has often either focused on shrinking civic space due to authoritarian tendencies and increasing state repression of critical voices and movements, or polarisation of political attitudes, and a increasingly harsh public debate. By shifting the focus on the civil society actors' experiences we have been able to address the phenomenon of hate speech, threats and harassment tout court. By adopting a relational perspective however, we have provided a nuanced understanding of the phenomenon depending on the actors' relation to the perpetrator. Furthermore, the concepts provided by framing theory, have allowed us to explore the processes of sense-making and meaning-attribution of the civil society actors when targeted by hate speech, threats and harassment.

Not surprisingly, the experiences of hate speech, threats and harassment are clearly filtered through the lens of the organisations own mission and value base. The contentious nature of the relations that civil society actors entertain outside and within civil society make it often difficult to draw moral and legal boundaries, especially in situation that touch upon core values and the mission of the organisations. Here the relation with the target groups functions as an important example. A certain level of contention seems to be acceptable if the actors want to pursue their goals. The same goes for dynamics internal to the organization where the democratic process of decision-making implies a certain level of conflict. In both cases there is of course a risk of underestimating the hazard coming from unsafe working environments and workplace bullying (including sexual harassment).

There are power dynamics at play when collective framings are created. They are potentially used to emphasise power structure and situations of oppression, but they have at the same time the capacity to hide other situations. Attention and

sensibility to internal power dynamics and to situation of oppression, can be traded for internal cohesion and mobilization towards a common goal.

Looking at more external dynamics we can see a certain acceptance for hate, threats and harassment in relation also to political opponents. In a sense it is part of the game. Some would argue that a social movement that does not upset anyone is not really doing their job. Challenging power structures is a contentious activity and reasonably raises opposition and mobilises countermovements. However, there is a risk of the cost becoming too high especially for leaders and representatives that can become targeted with smear campaigns with the effect of discouraging mobilization in society.

While the legal perspective is important, our study shows that we need a nuanced understanding of the phenomenon of hate speech, threats and harassment. A strict legalistic, zero tolerance approach, can in fact be used to criminalise any social movement or civil society actor that uses contentious strategies for raising awareness on specific issues that go against governments' policies. Capacity building focusing on hate speech, threats and harassment is needed within civil society to be able to tackle both internal and external perpetrators. It should include not only addressing the legal boundaries but also the moral ones and the way in which they intersect the goals and mission of the organisation. At a societal level we need to raise awareness on the risks of on the one hand an increasing polarised and harsh debate and on the other hand a criminalisation of dissent in the name of social peace.

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RESEARCH

Populism and its Horizon of Expectations: Threat to, Critique of, or Remedy for Liberal Democracy

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Abstract

Populism is variously understood to be a threat to, a critique of, or a remedy for liberal democracy. The normative consequences of populism, however, are not simply empirical questions. This paper contends that the normativity of populism is entailed already in its conceptualization; it is conditioned by the way in which scholars theorize populism, liberal democracy and the relationship between the two. This paper offers an examination of the *latent normativity* in conceptions of populism. By mapping the terrain of normative disputes within populism studies, I seek to contribute to a critical understanding of the conceptuality of populism.

Keywords: Populism, Liberal Democracy, Political concept, Normativity, Horizon of expectations

Acknowledgements

This work would not have been possible without the intellectual support of Andrew Arato and Carlos Forment. My great thanks to Julian Delgado Gomez and Olivia Steiert for their generous feedback and review of earlier drafts. I further indebted to Andreas Kalyvas and Jochen Schmon for the fruitful discussions on political concepts.

Declaration of conflicting interests

The author declared no potential conflicts of interest with respect to the research, authorship, and/or publication of this article.

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Funding

This research received no specific grant from any funding agency in the public, commercial, or not-for-profit sectors.

1. Introduction

The continual debates over definitions of populism and approaches to its study are signs of a living and vibrant field. The vigor and growth of this transdisciplinary field of populism studies, however, also call for moments of self-reflection and taking stock of the motions that have animated the field; not to provide definitive resolution, but to mark signposts and open avenues of research. A cartography of the ongoing debate on the varieties of theoretical approaches and conceptualization of populism has been attended to (Gidron/Bonikowski 2014; de la Torre 2018; Pappas 2016). Some scholars have also traced a genealogy of the concept (Skenderovic 2017; Fuentes 2020). What remains not clearly mapped is the debate around the normative imaginaries of populism.

In the definitional contestations over populism, scholars problematize the conceptualizations of populism from mostly an empirical standpoint: the central question being whether the concept enables discrimination of empirical phenomena.¹ Furthermore in contestations over populisms' effects and consequences, the answer is again derived empirically (Kaltwasser 2012). As Michael Bernhard and Daniel O'Neill (2022) suggest, study of populism should reorient itself to focus on the behavior of populist actors, especially when in power. This, however, is not as straightforward as it seems.

The difficulties around assessing the effects and consequences of populism begin not with case selection, but in the moment of conceptualization. The divergences in thinking about what populism does arise out of the way in which scholars theorize populism, liberal democracy and the relationship between the two. The deployment of the concept of populism and the theorization of its relation to liberal democracy involves normative commitments. Scholarship on populism thus necessarily requires an examination and evaluation of the *latent normativity* in the varied conceptualities of populism.

This paper seeks to map the terrain of normative disputes within the field of populism studies. In doing this, I seek to contribute to a critical understanding of the very conceptuality of populism. I will begin first by putting forward a theoretical

1 The whole debate around a 'minimal' or 'complex' definition of populism is precisely concerned with setting the criteria for case selection (Mudde 2004). De la Torre and Mazzoleni (2019) and Diehl (2022) offer formulations critical of Mudde.

method for conceptual analysis, and then apply this approach to major recent theorizations of populism. In conclusion, I will offer a heuristic schema for interpreting and evaluating the normative conceptualizations of populism. I underline the limitations on this procedure by pointing out that the field of populism studies is extremely broad and my schema cannot adequately capture the myriad axes of debates and contestations about populism – instead, it attempts to focus on one, albeit fundamental, axis of contestation: between populism and liberal democracy.² Many scholars with similar normative positions on what populism means for or does to liberal democracy might disagree on other aspects and features of populism. My ambition is therefore limited and is aimed principally at de-mythologizing the claims of ‘empirical’ or ‘positivistic’ studies of populism by exposing their unreflective conceptuality.

2. An Essentially Contested *Political* Concept

W.B. Gallie’s timeless definition of essentially contested concepts which “inevitably involve endless disputes about their proper uses on the part of their users,” remains instructive (Gallie 1955: 169). Essentially contested concepts entail internal complexity, that is there are distinct approaches to conceptualizing them and these approaches have their exemplars who reciprocally recognize the different strands. Further, there is an openness and competition in scholarship around the definition, analysis and judgement of the concepts. And finally, there are different criteria of *appraisiveness* – i.e. users endow the concept with different kinds of normative valence.

2 Conceptual debates on populism entail other substantive issues that cannot be adequately encapsulated within the populism contra liberal democracy frame. One major issue in debates on populism revolve around concerns about pluralism and monism. This discussion has implications for the normativity of populism in relation to liberal democracy, but it is difficult to map within the heuristic schema I have developed. Essentially this debate is about representation. While Müller (2016), Urbinati (2019), and Arato and Cohen (2021) hold that populism is a monistic form of politics, Laclau (2005a), Stavrakakis (2017a) argue for heterogeneity and pluralism. On the other hand, there are matters of debate within advocates of populism: for example, one common criticism levelled against Laclau’s equation of populism with democracy is his uncompromising insistence on the necessity of leadership. While some have made the case for the possibility of populism from below, what Paolo Gerbaudo (2017: 18) calls “populism of the leaderless people,” or what Laura Grattan (2016) calls a left “grassroots populism.” Laclau, and also Mouffe, remain convinced that a collective will “cannot be constructed without some form of crystallization of common affects” in the form of “affective bonds with a charismatic leader” (Mouffe 2018: 70). In his concluding remarks to *On Populist Reason*, Laclau even launches a scathing polemic against Michael Hardt and Antonio Negri’s (2009) notion of a leaderless “multitude” as the subject of democracy, which Laclau argues is politically ineffective and incapable of articulating a collective will (Laclau 2005a: 242-243).

Populism certainly fits the bill. It is an essentially contested concept with different theoretical conceptualizations and distinct strands of empirical research. The 'idea-tional' (Mudde 2004; Mudde 2017; Mudde and Kaltwasser 2017; Hawkins and Kaltwasser 2017; Hawkins 2018), 'strategic' (Weyland 2001; Weyland 2017; Roberts 2015; Barr 2018; Pappas 2019), and 'discursive'³ (approaches are well known and have scholars dedicated to these approaches, as well as some who are self-consciously synthetic in their approach.⁴

What I wish to primarily stress, however, is the fact that populism is an essentially contested *political* concept. It is instructive to follow the earliest, and in some ways, most insightful, theorization of "political concepts" that comes from Carl Schmitt. As he stressed in *The Concept of the Political*, "all political concepts, images and terms have a polemical meaning" (Schmitt 2007[1932]: 30). They refer to concrete political struggles and conflicts. The contested nature of political concepts is not simply restricted to definitional struggles, but to actual political antagonism. Political concepts dynamically reconfigure space of associations and dissociations among social groups, and the moment the concepts cease to produce these effects, they cease to be political.⁵

Political concepts entail not only contestations over definition but are discursively deployed in actual political struggle. William Connolly stresses this point in *The Terms of Political Discourse* (1993). Political concepts always intertwine descriptive and normative dimensions. They not only constitute and shape our understanding of political reality, but are also sites of disagreement, conflict and polemics precisely through which they acquire significance. Those who use political concepts disagree about the definition, but also crucially, about the value of the practices and actions *prescribed* by the concept.

Populism is a living political concept *par excellence* because it refers to ongoing concrete political struggles within and against liberal democracy (Finchelstein/Urbinati 2018). It is a concept used by defenders of liberal democracy against actors who

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- 3 The discursive approach includes two distinct strands which are worth differentiating. The first can be called the Laclauian strand which conceives of populism as a political logic of discursively constructing the "people" as a historical political actor (Laclau 2005a; Laclau 2005 b; Stavrakakis 2017a.; Mouffe 2018; Katsambekis 2022) The other strand within the "discursive approach" is what is better called the stylistic approach which focuses not on the construction of the "people" but the use of rhetoric and style of communication by populist actors (Moffitt/Tormey 2014; Moffitt 2016; Norris/Inglehart 2019; Waisbord 2018).
 - 4 There are approaches that mostly synthesize strategic and ideational (Urbinati 2014; Urbinati 2019, Müller 2016. Rosanvallon 2021), and few that all three (Arato/Cohen 2021).
 - 5 Schmitt argues the political concepts "are bound to a concrete situation; the result is a friend-enemy grouping, and they turn into empty and ghostlike abstractions when this situation disappears." (Schmitt 30).

pose a threat to that political imaginary, or it is used by those who find liberal democracy itself to be undemocratic and see in populism a corrective or even democratizing force. Those who mobilize the concept often end up with completely different and oppositional conclusions about its effects. This is the point I wish to make explicit. Most scholars who invoke the notion of populism today, no matter how positivistic, neutral and scientific they aspire to be, assume the polemical intent of populism toward primarily, but certainly not exclusively, liberal democracy and vice versa.

A political concept's antagonistic effects can be understood in terms of the imaginaries it generates. When one uses the concept 'authoritarianism,' one conjures specific expectations that are hostile to liberalism and democracy – like dictatorial institutions, prerogative power, media control etc.; it is unlikely that the notion would arouse expectations of greater rule of law, or institutionalization of checks and balances. Populism gives rise to three contested expectations vis-à-vis liberal democracy: a pathological threat to, a [dangerous] critique of, or a remedy for liberal democracy.

Reworking the Koselleckian notion of 'horizons of expectations' can help elucidate this point.⁶ Koselleck's metahistorical categories, 'space of experience' and 'horizon of expectations,' make it intelligible to comprehend historical time, and thereby conceptual history (Koselleck 1985; Koselleck 2002). A concept in concrete history mediates experience and expectations. An essentially contested *political* concept, however, opens a horizon of expectations that is contested and is a site of dispute precisely because it involves the formulation of antagonistic alternatives that can stimulate different images of reality, evoking aspiration, hope, or perhaps even dread.

There are two complementary strategies for the study of normativity in conceptualizations of populism. Yannis Stavrakakis has already traced the genealogy of anti-populism and demonstrated how the negative/pejorative meaning of populism emerged out of and is rooted in a liberal normativity (Stavrakakis 2017b). This genealogical method reveals how the mere invocation of the concept already entails political bias because the concept's original formation and deployment was by scholars and commentator's hostile to what they deemed were 'populist' mobilizations (Stavrakakis and Jäger 2018). The moniker was seldom used by the actors themselves. My procedure involves analyzing the concepts abstractly and is meant to be complementary to the genealogical method. Thinking together with Schmitt and Koselleck allows us to grasp how the normativity of political concepts entail contested horizons of expectations. I aim to read the field of populism studies from this understanding of political conceptuality.

6 I borrow this interpretation of Koselleck from Andreas Kalyvas who shared this insight during a discussion on political concepts

Grasping the contestations around the normativity of the concept will offer greater clarity and understanding of the political stakes and commitments of various thinkers. It will show how the negative polemical meaning given to populism emerges out of a defense of liberal democracy, and how the positive polemical meaning given to it emerges out of a critical gesture towards liberal democracy. The normative political content of populism exists always already at the conceptual level, prior to empirical or scientific studies of the phenomena. By examining some of the major conceptualizations of populism, this paper will distill and sketch out populisms' contested horizon of expectations.

3. Normativity in Populism

Regardless of the theoretical approach one subscribes to, all major contemporary thinkers of the concept, implicitly or explicitly, posit certain expectations over what populism holds in store for liberal democracy. When the concept of populism is deployed, it generates specific and contested imaginaries and possibilities. These imaginaries are animated by the sense that the antagonism between populism and liberal democracy is a fundamental political struggle. The anti-populism of many liberal thinkers is amply documented – they view populism as a threat to liberal democracy and view it as necessarily authoritarian. Matthijs Rooduijn (2016: 316) for example, has proclaimed that scholars have “moral obligation to protect liberal democracy” against the threat of populism. The opposite is the case for Ernesto Laclau and Chantal Mouffe (Laclau 2006; Mouffe 2018), both of whom view populism as an essential remedy for the democratic deficits of liberal democracy.

All the major contemporary theories of populism thus generate specific political horizon of expectations because they rely on specific (normative) conceptions of liberal democracy. The way populism, liberal democracy, and the relation between the two are conceived explain the divergences in their theories when it comes to assessing the effects and consequences of populism. I argue that the normative divergences among the theorists emanate from three criteria: (A) the commitments of these thinkers to their conceptions of democracy, (B) an appraisal of possible crises or deficits of democracy and (C) their relative emphasis on either the ‘movement’ or ‘in-power’ phase of populism.

Peculiarly, despite the normative differences, all theorists think of ‘liberal democracy’ as having a necessary double character: broadly, they view this political order as the composite of a liberal (rights, constitutionalism, procedures) and a democratic (popular sovereignty and equality) dimension, intertwined in an either historically

contingent articulation of harmony (Mudde/Kaltwasser 2017) or of ongoing constitutive tension (Mouffe 2000).⁷

This is also true of Margaret Canovan (1999; 2005), who was one of the first to comprehend what Benjamin Arditi (2004) has called the ‘spectral’ nature of populism in democracy. For her, democracy has two irreconcilable but inextricably interdependent ‘faces’: the pragmatic and the redemptive. The pragmatic side of democratic politics is concerned with the management and resolution of social conflicts through institutional means. The redemptive side of democracy, on the other hand, contains a secular promise to sovereignty of the people – that the government is by, for and of the people. Whenever a gap between the pragmatic and redemptive side of democracy widened, the ghost of populism emerged from the shadows to fill the abyss; “when too great a gap opens up between haloed democracy (redemptive face) and the grubby business of politics (pragmatic face), populists tend to move on to the vacant territory, promising in place of the dirty world of party maneuvering the shining ideal of democracy renewed” (Canovan 1999: 12).

Andrew Arato and Jean Cohen (2021) too, locate a similar dualism between constitutionalism and popular sovereignty. Nadia Urbinati’s ‘diarchic’ model – entailing a domain of will that is proceduralized through institutions like elections, and a domain of opinion where citizens come together to deliberate and contest the collective project – where the two domains are in a delicate balance, is also homologous (Urbinati 2014). What is common to all these formulations is that populism is located within and emerges from the ‘democratic’ realm, that of sovereignty, equality, or opinion formation – perhaps, the realm of the ‘political’ (in the Claude Lefort’s (1988) sense of the term) – and outside, mostly *against*, the institutional, procedural framework of democracy.

7 The thinkers I cite in this discussion about the distinction between the form and content of democracy are all theorizing within a liberal democratic paradigm. In this paradigm, the co-articulation of the distinct 19th century traditions liberalism and democracy is at the heart of the “paradox of democracy” (Canovan, 2002) or the “irreducible tension” (Mouffe 2005) between the two. Even when an author might mobilize the form/content distinction in reference to ‘constitutional democracy’ or ‘representative democracy’ they are locating its source in the traditions of liberalism and democracy. For instance, Arato and Cohen translate the tension between the two traditions into the tension between “liberal constitutionalism” and “popular sovereignty” (Arato/Cohen 2021: 153-156). Even Nadia Urbinati’s “diarchic” model which marks the distinction between the realm of opinion and will, the latter is normatively justified on the proceduralism of political liberalism (Urbinati 2014: 11-12). The thinker that does pose a challenge to this framing is Margaret Canovan. Canovan’s formulation of “two faces” of modern democracy (redemptive and pragmatic) do not align neatly with the distinction of liberalism and democracy, because as she notes, liberalism also has a redemptive and pragmatic sides. Nonetheless, the elements she discusses in her account of the pragmatic face – institutional and legal limitations on power – derive from the tradition of liberalism, while the principal element of the redemptive face is popular sovereignty (Canovan 1999: 9-14).

This highlights the second and third criteria for assessing the normativity of the various theories of populism. The framing of the double structure leads the different theorists to formulate somewhat similar accounts of crisis or the 'democratic deficit of liberal representative democracy' (Arato 2019: 318-341) to which populism is ostensibly a response. The Canovanian formulation remains central: populism emerges to reveal the redemptive face of democracy and the promise of popular sovereignty when there is social discontent and disaffection with the pragmatic face. Populism is an expression of popular sovereignty that is manifest outside of and typically against the institutional-procedural anatomy of democratic regimes. We can therefore see a parallel between these conceptions and the Lefortian distinction of *politics* and the *political* that Laclau builds on.

The normative positions on populism that follow from thinking of democracy in these dualistic terms, are ultimately predicated on the relative significance these theorists attribute to the institutional, procedural, and legal dimension, which can be called the *formal anatomy* of liberal democracy, and to the popular sovereign and egalitarian dimension, which can be called the *substantive content* of liberal democracy. To argue that populism's birth occurs with growing 'deficits' or gaps between the formal anatomy and the substantive content of liberal democracy then is to implicitly endow populism with oppositional and critical content. This is the third criteria for normative judgment on populism. If one then thinks of populism as an oppositional movement which reveals democratic deficits by critiquing the formal anatomy of liberal democracy, one can view it within the ambit of democratizing civil society movements. But many thinkers view populism as more than a movement in opposition, regarding it either as a strategy of coming to power or even a form of government. The theorization about the consequences of populism hence depends on the phase – movement or in-power – the theorist emphasizes. The crucial concern of most theorists in this transition from movement to in-power revolves around the centrality of leadership, and the anti-pluralism of populist politics.

We can thus formulate *three provisional axioms of normativity in theories of populism*. Of course, there are complexities entailed in the literature which I shall note, but the foregoing works as a useful heuristic schema. First, the thinkers who insist or implicitly believe on the separability of the formal anatomy and the substantive content of liberal democracy, and dispensability of the former are more likely to furnish accounts sympathetic to populism and view the phenomena as playing a productive critical role in democratization. Thinkers who are unwilling to accept the delinking of form and content, and focus more on populism in power, are likely to be more suspicious of and hostile to the phenomenon.

Second, if a scholar presents a diagnosis of a crisis of deficits (material, institutional and symbolic) of liberal democracy, they are likely to view populism as having a democratic aspect, while if the scholar does not, they likely view populism as

pathological. Third, if a scholar conceives of populism primarily as an oppositional movement, they are likely to view it as democratic, and on the other hand, if they conceive of populism primarily in-power, they are likely to view populism as hostile to liberal democracy.

The specific combination of these assumptions and their normative thrusts, which are internal to any conceptualization of populism, generates for any theorist different expectations of populism. In all, populism's future horizon contains three conflicting expectations: populism is (a) a pathological threat to democracy, (b) a [potentially dangerous] mode of democratic critique, and (c) a democratic remedy for the deficiencies of liberal democracy. At a superficial level my distinctions seem to echo the tripartite distinction forwarded by C. Rovira Kaltwasser (2012): populism as democratic pathology, democratic corrective, and democratic ambivalence. However, the crucial point of disagreement is that Kaltwasser's whole agenda is to advocate for conceiving of populism as democratic ambivalence because it overcomes the 'normative bias' of the other two positions and is better at accounting for empirical phenomena – his whole discourse is rooted in what I have called the mythology of the positivist definition of populism. My point is precisely to show how conceptual and theoretical assumptions about *populism*, *liberal democracy* and their interplay are what determine the normativity of populism. In this sense, there is no escape from *normative bias*. All scholars of populism, regardless of whether they subscribe to a singular theoretical approach or work with a synthetic model, can be classified broadly into these three normative positions, and these positions follow from the axioms of normativity I have outlined in this section.

a. Populism as Pathological threat

The concept of populism invokes dread and fear for the liberal democratic imaginary. This is the negative expectation of populism's horizon. Not all thinkers agree that populism is conditioned by democratic deficits or democratic crises. In the strategic-stylistic approach, which endows 'populist' actors with a certain kind of opportunism in coming to power, crises can be staged to mobilize support. The strategy school purists, like Kurt Weyland (2020), in their very conception, view *populist* actors in Machiavellian shade. Weyland is explicitly committed to a pluralist conception of democracy and argues that populists in government tend to "asphyxiate democracy" by compromising institutions of checks and balances and political competition. "They leverage their institutional attributions as chief executives, and the mass support certified by their initially democratic election to dismantle liberal pluralism gradually in formally legal or at least para-legal ways" (Weyland 2020: 389).

Nadia Urbinati (2014; 2019) and Pierre Rosanvallon (2008)⁸, who work with synthetic conceptions, too, do not engage with the idea that contemporary populism is a response to a de-politicized and purely procedural democracy – a democracy rid of substance and left with form. Urbinati's two texts on the subject *Democracy Disfigured* (2014) and *Me the People: How Populism Transforms Democracy* (2019) are vigorous defenses of procedural democracy. For Urbinati and Rosanvallon, what other scholars call the 'crisis of democracy' or 'crisis of representation' is in fact 'unpolitical democracy' – or rule of experts, technocracy etc. Populism in their view is not a response to unpolitical democracy but is an accompanying de-democratizing force.

Urbinati and Rosanvallon view populism as a pathology which undermines and displaces procedural democracy. Although they are not theoretically aligned, their treatment of the problem of populism has a degree of resonance. Both want to suggest that populism is neither a response nor a remedy to a crisis of democracy, but rather a symptom that unravels democracy and jeopardizes its liberal procedural elements. Their normative position on populism, crucially, is shaped by the theorization of democracy itself. Urbinati's diarchic conception of democracy consists of a 'realm of will' exercised through electoral decisions and democratic procedures and the 'realm of opinion' which is mediated through the public forum that plays a legitimating role by facilitating the exchange of ideas among citizens, ensuring that opinion is efficacious, and the will is restrained. This framework allows her to highlight the disfiguring threats of populism to democracy. Unpolitical democracy, in her words 'epistemic democracy' or technocracy, as well as populism are opposite sides of the same coin; they share an 'unpredicted proximity' (Urbinati 2014). Both emerge from the realm of opinion as forms of rabid distrust in the workings of democratic procedures and attack the realm of will. Both disrupt the delicate balance of the diarchy. While unpolitical democracy is a depoliticized form of assault, its sister symptom, populism, is a *hyper*-politicized manifestation where a mythical unity of the people as the sole author of a unified will emerges against the corrupt elite. Populism undercuts the institutional frameworks of representation by positing a verticalization of politics where the leader alone embodies the 'people,' which is what she calls 'direct representation' (Urbinati 2019: 7).

This shift in how citizens are portrayed explains "populism's profound antipathy to pluralism, dissent, minority views, and the dispersion of power, all of which are characteristics that democratic procedures intrinsically presume and promote" (Urbinati 2014: 133). Populism is for Urbinati a constant and ever-present possibility. It is a constant companion of representative democracy, a dark underside. But her

8 Rosanvallon's position has changed with his latest text (2021), but it is still instructive to examine the argument in *Counter-Democracy*.

response to it is to double down on liberal proceduralism. To ensure that the public forums do not get corrupted by the insidious allure of populism.

She has developed her argument further in her most recent text *Me the People* (2019) emphasizing populism's in-power phase as a governmental form – a new form of representative government where the leader defines the people. But this new modality of representative government, which undermines fundamental political rights – which are themselves crucial for the realm of opinion formation – Urbinati is emphatic, is “not democracy at all” (2019: 10). Her critical view of populism stems precisely from her insistence that the formal anatomy of liberal democracy cannot be separated from democracy. Liberal democracy, for Urbinati, is a pleonasm, which is to say, democracy is liberal or it's not democracy. The “external form of democracy is essential to democracy. It is not merely ‘an appearance,’ and it is not the prerogative of liberalism alone. If one adopts a nondiarchic conception of democracy and stresses the moment of decision (of the people or their representatives) as the essence of democracy, the mobilization and dissent of citizens appears to signal a crisis in democracy instead of appearing as a component of democracy” (Urbinati 2019: 11). This is the critical point of her theory. Populism emerges from the realm of opinion formation; the very condition of its possibility is shaped by the formal anatomy of liberal democracy. But in instituting an alternative monist form of representation and undermining the formal structure which secures the realm of opinion formation, it poisons the very soil on which it stands.

Rosanvallón's argument is somewhat analogous and identifies populism as a pathological symptom of a crisis of democracy. Rosanvallón's project in *Counter Democracy* (2008) is to enunciate forms of democratic practices that rely on negative sovereignty, that is practices – ways of organizing distrust in the form of vigilance, denunciation and evaluation – through which citizens resist and defend, not positively exercise, their sovereignty. His model of liberal democracy is also dualistic and similar to Urbinati's diarchic conception. Democracy involves a positive popular sovereign dimension institutionalized through electoral representation, and a negative sovereign dimension, ‘counter democracy.’

His objective is to expand the view of what democracy is beyond its electoral shell. However, his main concern is that the organization of distrust, that is counter-democratic practices, can entirely displace all aspects of positive practices of democracy – procedures, elections, institutions etc. Populism achieves precisely this. Populism is “a pathology in two senses: as a pathology, first, of electoral-representative democracy and, second, of counter-democracy. Populism is not just an ideology. It is a perverse inversion of the ideals and procedures of democracy” (Rosanvallón 2008: 265). It radicalizes counter-democratic practices and culminates in a “purely negative politics,” “an acute manifestation of contemporary political disarray and a tragic expression of our inability to overcome it” (2008: 273).

Now the question is, why does this happen? Rosanvallon is more sympathetic than Urbinati to thinking of crises as key instigators of 'populist' phenomena. The cause of 'populism,' Rosanvallon argues, is the political disenchantment with democracy. The disenchantment has to do with the end of a future vision – a kind of depoliticization where there are no contestations about the collective project – and a crisis of representation. There are two factors at play: First, the greater complexity and differentiation of society with different groups posing unique demands makes unity impossible, and second, more strikingly, the decline of class politics leads to post-ideological politics devoid of grand narratives of emancipatory prospects. Populism is a pseudo response to this disenchantment, reliant on propping up a mythical unity of the people that attempts to break away from the state of disenchantment (2008: 168-170).

The hyper-negativity of populism is what makes it pathological. As Rosanvallon develops his argument more in his recent publication, *The Populist Century* (2021), populism fosters a politics rooted in the language of rejection. Both Urbinati and Rosanvallon, therefore, view populism as a pathology that fosters distrust against democracy and 'disfigures' democracy from within.

The third paradigmatic voice that conceives of populism as a pathological threat to liberal democracy is that of Jan-Werner Müller (2016). Müller is somewhat sympathetic to populism's movement phase critique of democratic deficits: He argues that populism becomes potent in moments when fear, anger and frustrations are high, but he insists that there are legitimate reasons for these fears. Though Müller's analysis on the causes of populism is deficient, it nonetheless ascribes the wave of post 2011 American populism (Tea Party and Trump for example) chiefly to "very real material grievances," government response to interests of the few over the many, along with demography and politico-cultural changes, and the wave in Europe to the Euro Crisis and apathy of the EU technocracy (2016: 85-86).

Despite this, Müller is adamant to highlight the fundamentally undemocratic character of populism in power. Populism is an exclusively negative phenomenon, always representing a pathological threat to democracy. Populism in power, although not necessarily totalitarian, almost invariably culminates in 'defective democracies.' Making subtle links between fascist and populist ideology, and connections between their practices, Müller demonstrates that contemporary right-wing 'populists' operate with a monolithic and imaginary concept of 'the people,' drawing a 'friend-enemy' opposition and appealing to a mythical *Volksgemeinschaft*. Although populists always present a critique of elite politics, their insistence on being the exclusive representatives of a "single, homogenous, authentic people" is where the problem lies (2016: 3). Müller argues that populism is rooted in a *pars pro toto* logic which views only "a part of the people [as] the people" (2016: 22). This position insists that

populism is ultimately hostile and destructive to liberal democracy because of its illiberalism and undemocratic character that is unleashed when it is in power.

Urbinati, Rosanvallon, and Müller's respective theorizations of populism draw mostly on the strategic-stylistic approaches of populism and hence pays greater attention to how populist actors act and the kind of representational claims they make. That new kinds of popular political subjectivity emerge and contest to discursively open the space of political possibilities is not really taken seriously because they endow populist phenomena with a kind of rabid anti-institutional cynicism.

While Urbinati and Müller insist on strengthening the formal anatomy of liberal democracy and making room for institutionalized intermediate powers like political parties and the media (Urbinati 2015; Müller 2021) to counteract the populist pathology, Rosanvallon's recommendation to oppose this kind of politics, however, is slightly different. Instead of simply reinforcing the procedural aspects or the formal structure of liberal democracy, and preventing the realm of opinion from the disequilibrium of politicization, he argues that politics has to be particularized – a politics of presence (Rosanvallon 2011). It is no longer tenable to offer grand collective narratives, but political meaning has to be diffused to individual actors making politics proximate to their life's struggles.

They only superficially examine the conditions within liberal democracy that stimulate the emergence of populism, and remain confident that intermediary bodies, proceduralism and legitimacy through particularity, respectively, can be corrective and deflect the threat of populism. This is particularly striking because these solutions don't seem to address the very conditions that give rise to populism. More crucial is the fact that they view populism as not democratic, but not fully fascist or authoritarian either (Finchelstein/Urbinati 2018). This is quite a paradox, because as Urbinati admits, populism still retains its legitimacy in power through plebiscitary elections – in fact, she says populism, unlike anti-democratic phenomena like fascism, remains "parasitical on democracy" (Urbinati 2019: 20). If this is the case, populism, even in power, and to the extent that it does not actually subvert electoral competition, has a minimally democratic content. Admitting this however would put her very normative model of democracy in jeopardy. More importantly, it would force this line of argumentation to reckon with the democratic deficiencies and limitations of liberal democracy. The acceptance of a democratic dimension of populism is more explicitly articulated by the second type of normative position which recognizes the critical content of populism while robustly noting its dangers, especially as it enters power.

b. Populism as [Potentially Dangerous] Critique of Democracy

Populism gives rise to an ambivalent expectation as well (Kaltwasser 2012). A wide range of thinkers can be included in this camp. The principal difference between

these thinkers and the ones discussed in the previous section is that the former grant a democratic character to populism, especially in its movement and oppositional phase. This is because the thinkers in this camp understand that populism is often a response to serious crises or deficits in liberal democratic governance.

However, all of them recognize that populism when it transitions from movement to 'in-power' phase can and often does become a danger to democracy (Levitsky/Loxton 2012). Scholars, especially those working with a synthetic model with a strong emphasis on the strategic approach, see a *necessarily* authoritarian tendency in populism, while others, especially those more influenced by the ideational approach, classify 'populists' as *potentially* anti-democratic, precisely because they are more willing to insist on the separability of the formal anatomy and substantive content of liberal democracy.

Drawing on the causal schema developed by Gino Germani in *Authoritarianism, Fascism and National Populism* (1978), integrating three temporal-structural levels of long-term, middle-term and short-term factors, Andrew Arato and Jean Cohen offer a Canovanian formulation locating populism as an ever-present possibility due to the long-term structural tension between constitutionalism and popular sovereignty that is intrinsic to liberal democracies. However, they also add that the trigger for 'populist' phenomena are more immediately found in middle-term 'deficits' of representation (especially of party systems) and welfare, and short-term 'crises' phenomena (Arato/Cohen 2021: 29-46).

"Populism," when it emerges from below in civil society, typically is symptomatic of democratic deficit against which it protests. "We do not wish to deny that contemporary populism has a point that should be taken seriously. This we see in its critical dimension, especially in the early phase when populism is a movement in civil society" (Arato/Cohen 2021: 2). However, they also note, learning from the strategic-stylistic approach, that populism need not always emerge in movement form from below, but can be mobilized from above. This leader-centric claim of representation of a homogenous people, which takes the part it represents to be the whole, and seeks to exclude the antagonistic opponents, has a phenomenal political logic, which Arato and Cohen demonstrate is immanently authoritarian. Building on their previous critique of populism's anti-pluralism, with specific attention to populism's animosity towards the functions of civil society, they argue that as populism transitions from the critical movement phase to contestation for power in the party phase, and then the three 'in-power' stages – "in government," "the government" and "regime" – it becomes progressively anti-democratic (Ibid.: 110-145; Arato/Cohen 2018). In this analysis "populism in-power" becomes a necessary threat to liberal democracy, because although they accept that liberalism and democracy are two distinct intellectual and political traditions, like Urbinati they insist that democracy without the descriptor liberal is not democracy at all.

Though populism comes to power through electoral victory, its logic is such that to maintain power, it gradually either transforms democracy – hybridizes it (Peruzzotti 2017) – or altogether eliminates electoral competition and democratic contestation. “The logic of populism is authoritarian, despite its reliance on democratic legitimation and on forms such as elections and participatory mobilization. The authoritarianism inherent in populist logic becomes discernible once populists win power, shape government institutions, reshape the norms of governing, and replace or revise constitutions to expand and ensure their power. Populism’s logic leads to the production of hybrid political forms when populists enter and especially when they become ‘the’ government. Indeed, if they enter government and remain populist, populist politicians ultimately tend toward regime change” (Arato/Cohen 2021: 107). The expectations for populism in power are authoritarian.

The most sympathetic account of populism within this camp are those that see populism as essentially democratic but not liberal. Cas Mudde and Rovira Kaltwasser (2018) are influential proponents of this position. This account, as I tried to schematize in the introduction to this section on normativity of theories of populism, has to do with how these thinkers conceive of the separability of liberal democracy’s dualism. As Mudde and Kaltwasser put it, “In our opinion, democracy (sans adjectives) refers to the combination of popular sovereignty and majority rule; nothing more, nothing less. Hence, democracy can be direct or indirect, liberal or illiberal” (Mudde /Kaltwasser 2012: 10). Mudde and Kaltwasser thus describe populism as “the illiberal democratic response to undemocratic liberalism,” a formulation which insinuates that both the formal anatomy of liberal democracy can exist without substance – ‘undemocratic liberalism’ – and that populism, though illiberal, is democratic (Mudde/Kaltwasser 2018: 116).

An identical separation is also made by Takis Pappas. In fact, he defines populism as “democratic illiberalism.” He argues that “the terms populism and ‘democratic illiberalism’ ... carry exactly the same meaning and denote exactly the same thing” (Pappas 2019: 33). Mudde and Kaltwasser, and Pappas are ‘positivists’ who attempt a balanced study of what they determine were populist movements in different socio-historical contexts, and argue that populism has an ambivalent relation to liberal democracy in general.

Mudde and Kaltwasser’s analysis is strongly concerned with populism as movement or in-opposition. Here they even argue that leadership, a central concern for all normative criticisms of populism, is not essential. “An elective affinity between populism and a strong leader seems to exist. However, the former can exist without the latter” (Mudde/Kaltwasser 2014: 382). Their reliance on the demand-supply framework and the ideational approach pushes them to engage with the conditions which ‘activate’ populist attitudes. What they insist on is that populism, by simplifying politics and politicizing ‘unpolitical’ issues, brings marginalized or disillusioned

individuals into the fold of active political life. But this impetus can only work in certain conditions.

Nonetheless, by the time populism begins its contest for or acquires political power, Mudde and Kaltwasser recognize that it *can* (not as a logical necessity *a la* Arato and Cohen) become inimical to liberal democracy as a regime form. This is due to its monistic and antagonistic dimensions. Here they rehearse an argument like that of Arato and Cohen. Given populism crystallizes political conflict between two homogenous and monistic groups, pure people and corrupt elite, it has a tendency to be exclusionary and hostile to pluralism. Nationalistic, racist, xenophobic rhetoric in the populist movements they identify embody this illiberalism. The problem gets intensified when populism comes to power; its reliance on leadership makes it extremely dangerous to constitutional, institutional, and procedural elements of liberal democracy. Because 'populists' embody the 'general will' they can take decisions that undermine liberal democratic forms and institutions. Even though populism mobilizes people, and has a democratic element, its illiberalism and vertical structure can be a threat to democracy as such.

Though Mudde and Kaltwasser make a gesture towards a critical stance on liberal democracy their recommendations include engagement with populists through deliberation, engagement with issues that populists raise, and articulating more specific critiques of politics (for example anti-austerity) rather than making claims about 'the people.' Ultimately, they all advocate for strategies of containing populist politics. For most thinkers in this camp, liberal democracy remains the normative sphere of politics, and even if they recognize the need for further democratization of liberal democracy, they emphatically agree that populism is not the way to achieve this.

One thinker whose theorization of populism exists at the boundaries of this tendency and bleeds into the affirmative normative position of populism is Margaret Canovan. She does think that populism is an essential democratic ideology but not that populism is necessarily a corrective remedy. The Canovanian theory of populism as the mode of politics through which the redemptive face of democracy realizes itself against a stagnant pragmatic face has been developed earlier. Canovan's argument, however, is much stronger in its endorsement of populism than the variants we encountered in this section. Her claim is that populism is the *necessary* dialectical response to a widening chasm between the pragmatic and redemptive face of liberal democracy. She argues that "democratic institutions need an occasional upsurge of faith *as a means of renewal*. In cases where radical populist mobilization... leads to the formation of new parties or to a reform of the institutional structure, democracy may indeed be regarded as a self-correcting system in which both aspects play their part" (Canovan 1999: 14).

Canovan's theory puts greater emphasis on the movement and oppositional phase of populism. It's populism's critique of the ossified formal anatomy of liberal democracy that paradoxically revitalizes liberal democracy. In other words, the survival of the pragmatic face, especially when it has ossified and become unresponsive to the demands of citizens, itself depends on populist response. This does not mean that populism necessarily democratizes regimes. The populist response however can go awry in an authoritarian and monistic direction, but its existence is part of an unresolvable paradox of democracy. As she argues, populism "which reduces the complexities of politics to dogmatic simplicity, is ill-fitted to deal adequately with these intricacies [of democracy], and yet is at the same time indispensable in mass politics" (Canovan 2002: 26).

c. Populism as a Democratic Remedy

The positive expectation on the horizon instituted by the concept of populism is that it is a remedy for emaciated and deficient democracy. Thinkers within this imaginary conceive of populism as both a critical and normative concept: critical in the sense that it points to the limitations and deficiencies of existing liberal democracy, and normative in the sense that phenomena understood as populism are the corrective measures to strengthen democracy. Within this normative position, however, a stronger tendency exists: this tendency, best embodied by Ernesto Laclau, views populism as inherently democratic. The normative position of democratic remedy, including the Laclauian tendency, emerges out of three theoretical suppositions: first, that democracy as a political form can be conceived as separable from liberalism; second, that populist mobilizations are response to deficits of liberal democracies; and finally, that populist mobilizations are mostly oppositional movements not governmental or regime types.

This strand of thinking about populism begins with a critical diagnosis of liberal democracy. They contend that the outburst of populist phenomena is an expression of liberal democracy's de-democratization. Camila Vergara, for example, refutes Nadia Urbinati's argument in her normative endorsement of populism as a form of plebeian politics: "Rather than a *disfigurement*, I would argue populism should be considered as a response to an already existing deformity in liberal democracies: the overgrowth of oligarchic power. Populism should be considered as a badly needed, corrective plebeian intervention against oligarchy" (Vergara 2018: 239-240). While Vergara provides a distinctively republican interpretation of populism, the phenomena for her operates within the liberal-democratic political space. Populism is, as she puts it, "a republican symptom of democracy, as a particular manifestation of the plebeian principle within the current framework of liberal democracy and electoral politics" (Ibid.: 237). The strand of thinking that conceives of populism as a remedy thus inverts the argumentation of the strand that conceives of populism as

a pathology. They contend, instead, that it is the pathologies of liberal democracy – neoliberal oligarchy and technocracy – that populism seeks to correct.

The critical gesture towards liberal democracy is also present in the two major endorsers of populism, Ernesto Laclau and Chantal Mouffe. Yet, there are significant differences between them that are worth highlighting. While Laclau's account is a formal-theoretical one and is laid out with a great deal of nuance, Mouffe, in her latest *For a Left Populism* (2018) furnishes a more conjunctural and concrete normative project. For Laclau the conditions for populism's emergence arise when a political regime – including, and I would argue specifically, liberal democratic ones – is unable to respond properly or adequately to the demands of those it aims to govern (Laclau 2005a). Laclau argues that “populism presents itself both as subversive of the existing state of things and as the starting point for a more or less radical reconstruction of a new order whenever the previous one has been shaken”; It “proceeds by articulating fragmented and dislocated demands around a new core....[Thus] some degree of crisis in the old structure is a necessary precondition of populism.” This analysis leads Laclau to the conclusion “that populism *is the democratic element* in contemporary representative systems” (Laclau 2005a: 176-177).

For Laclau, populism is the political form through which a ‘people’ as a political subject gets constituted within an existing political order. Populism is therefore necessarily oppositional. It is the inevitable political act through which antagonism is generated against a prevailing system. Since populism is the activity of constituting a ‘people’ that is to be the subject of political sovereignty, the populist logic becomes identical, in Laclau's theory, with democracy as such. The analysis culminates in the following formula: Populism = political = democracy (Peruzzotti 2018). Normativity is entailed in the equation.

An important caveat, however, is that populism for Laclau is not specifically antagonistic towards liberal democracy. Populism can be constructed against any target. Given the abstract nature of his theory of populism, he can even maintain that ‘liberalism’ itself can become one of the demands articulated by populism (Laclau 2005c). However, given the global hegemony of liberal democracy, Laclau's theoretical ambition has been to think of democracy outside of the liberal-democratic symbolic space. This is most clearly laid out in Laclau's critical discussion of Claude Lefort in *On Populist Reason* (2005a: 164-171). Populism thus becomes for Laclau one modality of opening up possibilities for the rearticulations of democracy as populist or radical democracy (Laclau 2005c). “Once the articulation between liberalism and democracy is considered as merely contingent” the conclusion that follows is “other contingent articulations are also possible, so that there are forms of democracy outside the liberal symbolic framework” (Laclau 2005a: 167).

He is thus not interested in the liberal institutional dimension of liberal-democracy. He is only interested in the work of the *political* realm in the Lefortian sense

of the term, because the constituting a popular subject is intrinsically democratic and the central task of radical politics (Laclau 2006). In his system, therefore, there is no 'populism in power' because that already marks the transition from the *political* to *politics*. This reticence of Laclau in examining what populism does or wants to achieve when in power and in what context is not fully satisfactory.

For a more specific normative argument in explicit relation to liberal democracy, we'll have to look at Mouffe. She in fact explicitly proposes that populism leads not to the utter disfigurement of democracy but to concrete possibilities for recovering and radicalizing it. Her programmatic manifesto, *For a Left Populism* (2018) makes precisely this case. Mouffe's short but dense manifesto is the most comprehensive formulation of how populism is a democratic remedy, but it is also paradoxical because it ends up undercutting the very Laclauian theoretical bedrock upon which it stands. This tension is worth pausing on because Mouffe, unlike Laclau, does not want to depart from the normative model of liberal democracy. Her whole project is to show how populism can play a democratic role within liberal democracy.

Mouffe's conception of liberal democracy, which she developed in her work on the *Democratic Paradox* (2000) and *On the Political* (2005), is that of a historically contingent articulation of liberalism and democracy; two ultimately irreconcilable principles that exist in a paradoxical and conflictual relation. Democratism defends egalitarianism and popular sovereignty, and liberalism, propounding universal liberty, promotes inclusion and pluralism. They, ideally, exist in a necessarily conflictual relation stabilizing the hegemonic configuration of liberal democratic regime. This conflictual relation, she argues, was manifest in the form of "an 'agonistic' negotiation between right and left" (Mouffe 2018: 14-15).

The neoliberal onslaught, after the crisis of social democracy, established the hegemony of a 'Third-way' that depoliticized liberal democracy. "As a consequence of neoliberal hegemony, the agonistic tension between the liberal and the democratic principles [...] has been eliminated. With the demise of the democratic values of equality and popular sovereignty, the agonistic spaces where different projects of society could confront each other have disappeared and citizens have been deprived of the possibility of exercising their democratic rights. To be sure, 'democracy' is still spoken of, but it has been reduced to its liberal component and it only signifies the presence of free elections and the defense of human rights. What has become increasingly central is economic liberalism with its defense of the free market and many aspects of political liberalism have been relegated to second place, if not simply eliminated" (Ibid.: 16).

This new reality is what she, drawing on the work of Colin Crouch (2004) and Jacques Ranciere (2014), calls post-democracy. For Mouffe, post-democracy is a specific diagnosis of the crisis of liberal democratic regimes of post-war Europe. Post-democracy is the erosion of principles of popular sovereignty and equality

and the displacement of liberal values by neoliberal individualism, decline of political representation,⁹ and oligarchic tendencies within liberal democratic regimes. Colin Crouch (2021) and Wendy Brown (2019) have similarly furnished accounts of 'post-democracy,' a concept that critically points out the limitations and deficiencies of liberal democracy to which populism is a response.

Mouffe also wants to highlight this organic relation between post-democracy and populism. After decades of emphasis on administration and governance, the financial crisis led to the unraveling of the neoliberal order. The rise of austerity and generalized economic inequality intensified the deficits of governmentality and representation, polarizing society. After the 2008 financial crisis, a new opening emerged. The financial crisis put the neoliberal hegemonic order in jeopardy, fostering conditions for the rise of populism. The 'populist moment' thus signals the crisis of a *post-democratic* condition.

Post-democracy has stimulated a right-wing populist response that, Mouffe claims, has a 'democratic nucleus,' and to which the liberal and social democratic consensus is unable to respond, rendering naked its inability to escape the post-political imprisonment. The Left, Mouffe proclaims, must seize the opportunity to re-politicize itself. Mouffe is emphatic about the urgency of the moment: The Left must put forward its own populist project because the democratic possibilities for the future depend on that. Mouffe acknowledges that this is a political gamble which might lead to unfavorable outcomes. There is no guarantee of a successful radical democratic project, but the cost of letting go of this opening for a Left Populism is pretty severe (Mouffe 2018: 85). This is in immediate contrast to those who view populism as a pathology that can be contained. Mouffe's point is precisely that the crisis of post-democracy is so severe that the choice is only between right and left populisms. Non-populist deliberative and pluralistic strategies will not win.

Mouffe's concern is the alleged eradication of a previously existing and thriving agonism between liberalism and democracy. Her whole project therefore is animated by her critical attitude towards liberal democracy. She does not view that as a sufficiently democratic end, but nonetheless is not entirely willing to dispense with the liberal dimension. She wants to first recover this because the liberal democratic ideal is where possibilities for a radical democratic project lie; neoliberalism cannot be radicalized. Therefore, the populist response to this moment must be aimed at constructing a 'people' which articulates a collective democratic will. This 'people' must incorporate again all forms of democratic demands, "of workers, the

9 For post-democracy debates on representation and political parties, see Mair 2013; Katz/Mair 2018. For critique of capitalist advance within liberal democracy see: Winters 2011; Streeck 2014; Jessop 2013: 83-105; Crouch 2004.

immigrants, and the precarious middle class, as well as other democratic demands, such as those of the LGBTQ community" (Ibid.: 24).

Her text is peppered with cautions about uncertainty: "this might lead to authoritarianism," "there is no guarantee that the new order will bring about significant advances," "refusal of neoliberalism is not a guarantee of a democratic advance" etc. (Ibid.: 6, 34, 64, 85). It is a gamble that might pay off.

There is, however, an important tension in her prescription. To recall Laclau, although it is impossible to determine what his position on this text would be, his theoretical outline on the political role of populism is quite open-ended. The point of a populist articulation is to open up space for alternatives. Mouffe, on the other hand, is more deterministic. She is trapped in a conundrum. She wants a transformative hegemonic formation, but because of the emphasis on leadership, she is forced to constrict it within the paradigm of liberal-democracy, most possibly to contain authoritarian tendencies. While Laclau's populism leads to a real rupture in the political space, she attempts to prefigure its scope and make it compatible with liberal democracy. Once left populism comes to power, a democratic transformation "of the existing hegemonic order without destroying liberal-democratic institutions" is possible (Ibid.: 36). Additionally, the populist constitution, in her model, is agonistic and not fully antagonistic. She proclaims that the Left's "recognition that the 'friend/enemy' model of politics is incompatible with pluralist democracy and that liberal democracy is not an enemy to be destroyed is to be applauded" (Ibid.: 36-37). The enemy is rendered adversary because a Schmittian formulation – and since she does not explicitly say it, I'm likely making an unjustifiable inference – would either necessarily or with a higher degree of propensity lead to left-authoritarianism. To resist the charge of being illiberal, Mouffe's Left populist project is confined within predetermined parameters of possibility. To prevent a complete authoritarian or revolutionary move, Left populism, Mouffe implies, needs to be curtailed within the liberal democratic institutional framework.

Her position thus diverges from Laclau in this fundamental sense. She too remains more or less committed to liberal democracy. Though the content of Mouffe's desire for 'radicalizing' liberal democracy¹⁰ is not very different from Andrew Arato and Jean Cohen's ambition to 'democratize' liberal democracy through pluralist popular mobilizations that take procedural norms of democracy seriously (Arato/Cohen 2021: 180-201). The crucial difference is precisely that for Mouffe only populism realizes the expectation of radicalizing democracy (Mouffe, 2018: 85).

10 She calls it "radical Reform" as opposed to revolution and simple reform

4. Conclusion

Even though many scholars agree that the contemporary rise of populism breeds and grows under experiences of de-democratization, crisis of democracy, or post-democracy, the scholars disagree fundamentally on populism's consequences for democracy. Populism is viewed by some as a pathology of democracy, which is a revealing symptom of the problems of liberal democracy, or by some as a legitimate response to undemocratic or crisis conditions but which, when in power, is ultimately dangerous to democracy, and finally by some as the necessary and appropriate modality to counter the crises of liberal democracy. The normativity of their arguments follow, not necessarily from empirical study of cases, but are already contained in the conceptualization and basic assumptions about liberal democracy.

In dealing with this problem of populism, those critical of it essentially speak in favor of liberal democracy, calling for better procedures, or particularizing politics, or engaging with populism to neutralize it. Those ambivalent to it, are also ambivalent about the form of liberal democracy, and as such see in populism both democratic and authoritarian possibilities. Those in favor of populism, in particular Mouffe and Laclau, view populism as the only means to achieve radical democracy, because liberal democracy is too deficient and unresponsive to democratic demands. Part of the variability in definitions, theories and approaches to populism germinates from different normative considerations and attachments to liberal democracy.

Though there is no final definition of populism, and the concept is essentially contested, the terrain of contestation goes beyond the descriptive domain and necessarily enters the normative realm. Debates about better definitions for the sake of clarity, or better operationalizations for empirical research, can belie the fact the concept carries within it already its normativity. This is contingent on the specific combination of assumptions about liberal democracy contained in the conceptualization of populism. As I suggested above, we can infer three axioms of normativity which can be summarized as follows:

Conceptual Aspect	Theoretical Supposition	Likely Normative Conclusion
Separability of Form and Content of Liberal Democracy	Affirms Separability	Populism is democratic
	Negates Separability	Populism is anti-democratic
Crisis or deficits of liberal democracy	Presence of crisis and deficits	Populism is democratic
	Absence of crisis and deficits	Populism is anti-democratic
Phase of Populism	Conceived as movement	Populism is democratic
	Conceived as government	Populism is anti-democratic

This heuristic interpretive schema seeks to facilitate comparative theoretical analysis and foster a critical understanding of the conceptuality of populism. Most theorizations of populism, despite claims of positivism, empirical rigor, comprehensiveness are normative in their conceptuality and are intelligible within a liberal democratic paradigm. Populism as a contested political concept marks out a contested horizon of expectations. These expectations are prescribed by the presuppositions entailed in conceptualizations of populism – they are not derived from empirical scientific examinations based on objective conceptualizations. Demythologizing populism studies, to refer to Yannis Stavrakakis' plea (2017b), requires reckoning with latent normativity of the conceptual moves a thinker makes. My schema is an attempt to aid in this demythologizing the empirical and positivist claims about political concepts.

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INTERVIEW

Trumps Triumph? An Interview with Ingar Solty*

Keywords: Trump, US-election, Imperialism, US-Politics, Ukraine, Gaza

In December 2024, we sat down with Ingar Solty to talk about the 2024 US election, Trump's victory, Harris' defeat, and the things that we have to expect from the next Trump presidency. In the course of this conversation, we also discussed potential consequences for Europe and the political situation in European states, in particular Germany. As an interplay of various developments on the local, national and international level, Solty describes the 'Zeitenwende' as a shift in the geopolitical sphere that results from the re-rise of Trumpism in the United States.

***JPS:** How can we comprehend Donald Trump's election victory against the background of opinion polls published before the election?*

Solty: Before the election victory, it was said that it would be a neck-to-neck race, that it would be very close and that it would sometimes take days, if not weeks, before we would get an official final result. Of course, this was true with regards to some seats in the House of Representatives. Yet, I bet a lot of people who went to bed on election day were surprised when they got up the next day and realized: "Oh, the election is actually already over." Trump had actually won all seven of the battle ground states that were at stake. And this was already clear early on. Trump also won the election with a solid result and a large lead among the electoral college. Of course, that doesn't necessarily speak in favor of the polls. But we have seen in recent years, actually since 2016, that polling institutes have had problems predicting the election results. This is undoubtedly also due to volatile voter behavior and the difficulty of predicting absentee voting behavior. In fact, the post-election surveys that are now being relied on should be and have been readjusted to reflect absentee voting behavior. And there is a marginal difference, for example, if you compare the CNN post-election survey from election night with the data we have now.

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JPS: *Compared to Germany, France, Denmark or other EU members states, the political system in the United States is extremely personalized. Against this backdrop, we are asking ourselves whether Harris lost because she is a woman or Trump won because he is a man. Or to put it another way: Did the candidates gender play a role? And can you assess whether female candidates have a chance of becoming US President in the future? What does a woman have to bring to the table to beat someone like Trump?*

Solty: I think that's a narrative that has been put forward by the Democrats to explain their defeat. But there is a certain kind of helplessness to this claim. If you remember Hilary Clinton's 2016 election defeat, all she could ultimately say was that it was the left's fault because Bernie Sanders supporters trashed her in front of her voters. And then Putin was to blame because there was Russian election meddling in Trump's favor. I think this narrative that women are not being elected for the sake of being women and that the US is not 'ready for her' doesn't carry very far. For one thing, Clinton won the popular vote in 2016. In other words, she won the majority of votes, but lost in the first-past-the-post electoral system. In 2024, Trump won the popular vote for the Republicans for the first time since George W. Bush Jr. in 2004.

Furthermore, women have won many House of Representatives and Senate elections. A trans-person was also elected. I don't believe that gender decided this election. If you look at the fact that Trump is convicted for felonies such as fraud and hush money payments to a porn actress, that he is suspected of having committed acts of sexual violence against women, and that many other lawsuits are pending, it is surprising that he was still elected by the majority of white women. Moreover, among Latino women his approval rate went from 30 to 37 percent. So, I'm not convinced by the narrative that the US is not ready for female politicians.

In my view, it was not a pro-Trump election but an anti-establishment election. Trump was elected even though he is unpopular with active voters. More than 50 percent have a negative image of him. Even 54 percent of active voters who were mobilized and were more pro-Trump said they thought Trump's views were too extreme. And in spring 2024, for example, 74% of respondents said they thought Trump's election fraud in Georgia was very, very serious, according to the polling institute Ipsos. Yet, in November he was elected. Even 9 percent of those who have a negative image of Trump voted for him. This speaks more for a failed Democratic strategy than for a successful election campaign on Trump's side. I want to remind you that in his first presidency Trump fell below the critical 40 percent approval rating at a record pace and then exited with a historic negative rating because he failed to deliver on his promises. And I'm not talking about the wall against Mexico, but the self-financing of tax breaks for corporations and billionaires. Or the legacy of the coronavirus pandemic. So, it's more a question of why the Democrats have failed strategically.

JPS: *When Biden was still officially in the race, I remember a Pew poll where almost half the voters said, “We’d take any other candidate over those two.”¹ I always had the feeling that the early euphoria about the nomination of Harris came more from this disenchantment with all these old white men and less from the candidate Kamala Harris. Unfortunately, Democrats sought to strategically instrumentalize this dissatisfaction with the other candidates. And they built a campaign around the claim that she was simply someone other than Trump or Biden. But what’s the message in such a campaign?*

Solty: She actually turned the election into an anti-Trump election without sending out a pro-message. With the strategy of focusing heavily on the democracy issue at the end of the election campaign. And with the anticipation that Trump would create a kind of US fascism. And Trump actually made this the theme of the election. So, this was an election all about Trump, for or against Trump and not for a positive economic message from the Democratic Party.

JPS: *When it comes to election victories or defeats, Bill Clinton is often quoted for having said “It’s the economy, stupid!” There has been a lot of discussion around the relationship between identity politics and distributive politics in the 2024 election campaign. How would you summarize this debate and explain the different positions?*

Solty: We are witnessing the rise of right-wing authoritarian, nationalist forces in all capitalist centers of the West. It is connected to the international defeat of left-wing alternatives, as represented in Europe, for example, by the Greek Syriza government and their struggle for a social European Union and against austerity. Since their defeat, the election results of left and right populist forces have been diverging. And it is the right that is benefiting from the anti-establishment sentiment. Trump 1.0 was one example, BREXIT under right-wing auspices another. Against this backdrop, there is the very popular narrative spread by left-wing liberals that it is the rise of racism and sexism in American society that explains Trump’s election result. On the surface, this seems plausible. Namely, the assumption that if the left is too weak to show egalitarian ways out of the crisis, racist and sexist exclusion and demarcations, privileges of the already established, as Wilhelm Heitmeyer calls it, and so on will take a firm hold. Yet, there is no statistical evidence to support the thesis that racism and sexism are responsible for the election result.

Some have argued that the victory was about mass deportations, i.e., that majorities are now in favor of the great remigration project, which became the central campaign hit at the Republican party conference in Milwaukee. And yet, the issue did not play a role for the voters. The statistical data simply refutes the thesis of a social shift to the right. The decisive election issues were the economy with 32 percent and democracy with 34 percent. Democracy was a double-edged sword, as the question

1 <https://www.pewresearch.org/politics/2024/04/24/feelings-about-the-2024-race-for-president/>

of democracy could be raised from both sides. Democrats warned against the rise of fascism, Trump's authoritarian ambitions and the restructuring of the state. But Trump also warned that the Democrats were trying to smuggle migrants into the country through illegal immigration in order to prevent Trump's legitimate victory and the realization of the American peoples' true will. Accordingly, the fear that democracy was in danger was the most important issue, but voters in favor of saving democracy were split between the two parties.

When it comes to the economy as a factor motivating voters' decisions, it's pretty clear that economic issues people respond to are related to the material foundations of the populist situation in the US. The populist situation characterizes the loss of confidence in the country's trajectory and its political institutions. And frequent Gallup polls show that the last time a majority of the population saw the United States on the right track was in January 2004, i.e. at a point of ultra-nationalist and militarist mobilization and a moment in history when it seemed that the US had just won a war, the war in Iraq.² Moreover, polls concerning the problem-solving capacities of state institutions, especially Congress, have shown record-lows for two decades now, accelerated, of course, during and after the 2007 global financial crisis. Here the last time a majority expressed a favorable view of Congress's performance was in June 2003.³

In short, in the United States we have been dealing with a populist situation for an extended period of time which made both Donald Trump as well as Bernie Sanders, right-wing and left-wing populism, possible. And this populist situation, unsurprisingly, has material roots in the political economy of the United States. The material reality of the populist situation puts roughly 60 percent of Americans in working conditions where they live from paycheck to paycheck,⁴ meaning: they have no savings to bridge a pay gap due to inflation, involuntary part-time labor, physical or psychological sickness, no savings to pay for sudden financial burdens like healthcare, which is the number one cause of private household bankruptcies, no savings to afford the birth of a child and the resulting costs for daycare or the costs for elderly care. And this number has shot up from roundabout 40 percent prior to the global financial crisis. In my view, that is the basis for the anger. And Trump 1.0 was possible because Obama praised his post-crisis job miracle while in reality what happened was a recovery based on what the "Wall Street Journal" back then called a "low wage/part-time epidemic" where higher-end union jobs in manufacturing

2 <https://news.gallup.com/poll/1669/general-mood-country.aspx>

3 <https://news.gallup.com/poll/1600/congress-public.aspx>

4 <https://www.forbes.com/sites/joshuabecker/2023/08/18/61-of-americans-live-paycheck-to-paycheck-heres-the-simple-solution-were-overlooking/>

became replaced by lower-end jobs in the service industry,⁵ including a dequalification of labor manifested in the more than 1 million college graduates working full-time in the fast-food industry.⁶ Today, in 2024, those Americans, who were angry, voted for Trump. In fact, 70 percent of those who find the state of the economy is not good or bad voted for Trump. And there are a few other figures that point to this dissatisfaction with the situation: 56 percent voted for Trump. Of those who are angry, it was 72 percent. Moreover, those who say they have experienced severe hardships due to inflation and those who are pessimistic when they look at their own personal economic situation also voted for Trump in the majority.⁷ In other words, the economic situation quite clearly decided the election. Inflation ultimately cost Harris the election.

However, while the 2024 US presidential elections clearly ushered into a significant political right-wing shift, there are no signs of a societal shift to the right. The Republicans now control the Senate, the House of Representatives, the Supreme Court, the majority of governor positions in the states, and, which is terrible for the labor movement, the National Labor Relations Board. And yet, two-thirds of voters still support left-wing economic populist positions like the ones promoted by Bernie Sanders. Things like free university education, public healthcare provisioning (“Medicare for All”), and an inflation-indexed fifteen-dollar-minimum-wage. And they do so not only in theory but in practice. In the 2024 elections, referendums on these issues have turned out accordingly. Even in states where Trump has large majorities behind him and where the Democrats haven’t been able to succeed in decades. Even in Nebraska, an increase of the minimum wage to over 15 dollars and sick pay rights were adopted in a referendum. Now you could say, well maybe Trumpism means trade war abroad and libertarianism at home, but still that could be interpreted as a nationalist socialist position. But even on socio-political issues, there is no sign of a right-wing shift. For one thing, state-level referendums show that majorities defend “my body, my choice”. Even in states like Alaska, where Trump won in a landslide and the Democrats otherwise don’t stand a chance. Moreover, migration was not a decisive factor in the election. It was for only 11 percent, even though Trump and the Democrats made it a key election issue. Trump by promising the mass deportation of the twelve million undocumented workers. And the Democrats by saying, “Look, Trump only talks about deportations. He didn’t even build the wall. And we are the much more efficient deportees.” And yet, this issue was only decisive for 11 percent

5 <https://www.wsj.com/articles/SB10001424052970203707604578094601253124258>

6 See further Ingar Solty, *Die USA unter Obama: Charismatische Herrschaft, soziale Bewegungen und imperiale Politik in der globalen Krise*, Argument, Hamburg 2013, pp.15-71.

7 <https://edition.cnn.com/election/2024/exit-polls>

of voters. Even among active voters, 3/5 agreed that undocumented workers should not be deported but should be given the prospect of legal residence status. Consider this, this majority basically says: Even though these workers broke the law, they should be rewarded for doing so. Imagine the AfD and CDU/CSU campaign about how this would attract hundreds of millions of migrants from the global South! Given how important rules are for subjects under capitalism and the notion that everybody abides by them, this result is absolutely astonishing. And what this all means is that Trump has no mandate for what he has promised to his MAGA base. If he were to try and push through mass deportations, the illegalization of abortions and mass tax and social spending cuts on behalf of the billionaire class, he would be doing so against the majority of the population.

JPS: *Does this mean that in explaining Trump and his victory we would have to conclude that identity politics played a lesser and distributive politics a greater role?*

Solty: Exactly, or to exaggerate with a pun intended: class position trumps identity.

JPS: *What distributive policies does Trump's program actually envisage? And is it the case that economic hardship was actually decisive? Or has Trump's economic program convinced voters?*

Solty: First of all, the process of proletarianization of the Republican Party, which had already developed considerable momentum in 2016, has undoubtedly intensified. Even in Germany, we have problems identifying voters according to their class position. And this is more difficult in the USA. So, when you talk about the voting behavior of the working class, you're mostly talking about people with an income of less than 50,000 dollars, people without a university degree, union voters. And people who, for example, identify the economic situation as a deciding factor in the election. Or express that their economic situation is bad. But that can also include the petty bourgeoisie. So, it's not entirely clear, but nevertheless it can be stated quite clearly that there is an increasing proletarianization of the Republican Party. And yet I think this can be seen less as a pro-Trump election and more as an anti-Democrat, anti-establishment election. An election motivated by the anger about or disappointment with the status quo rather than the hope that Trump will change or improve the living conditions of the working class. And yet the question is of course legitimate: has Trump only ever formulated his economic policy in the name of the working class, as he did in 2016? Then, he was the only one to use this word and say that this was the day of revenge for the American working class. He promised that wages would return to unknown heights, even without labor disputes and unionization, to the level of the 1950s, where you could support a family and build a house on one income - the male breadwinner model -, even without a university degree. Trump's plan was always to return to this economic level on the basis of classical trickle-down economics. Or as Helmut Schmidt once put it: tax cuts for corporations today are the investments

of tomorrow and the jobs of the day after tomorrow. Needless to say that all this is highly ironic, because in the end the Trumpists seek to return to the 1950s (not least for reasons of patriarchy) but without everything that enabled that decade economically: strong unions, central banks oriented towards full employment instead of currency stability, restrictions on capital mobility, high taxes on the wealthy, a strong welfare state, and a mixed economy with a strong public sector providing services as commons, as public goods. Still, Trump unleashed ultra-libertarian policies in the name of the working class and, as was to be expected, he failed to realize this in his first term of office. The only thing that remained after a flash in the pan was a near doubling of the public deficit from US\$585 billion to 1.1 trillion and an increase of national debt from US\$19.95 to 27.75 trillion. Tax cuts did not refinance anything.

We can now take another look at the question and clarify what Trump had to offer voters in the 2024 election that could secure active approval at least for a certain period of time. For example, to avoid falling below the negative 40 percent approval mark again so quickly. Frankly, there is not much to suggest that Trump can build an alternative historical bloc. In other words, that he can somehow build and rely on consensus. On the one hand, this has to do with his customs policy. It is paradoxical that he won the election because of inflation, while his economic policy program is likely to perpetuate and increase inflation because it affects a working class that has become totally dependent on imports from China and overseas for its consumption. And the protective tariff policy directed against China and other countries must lead to a considerable increase in the price of basic consumer goods, also because of global supply chains for domestically produced commodities. Also, we can certainly assume that Trump will reduce the corporate tax rate, which he already did in his first term of office (from 37% to 31%). During the election campaign he spoke about 25 percent. It is possible that this will lead to another flash in the pan of investments. And Trump is of course hoping, as he did during his first term in office, that special economic zones will bring the production of industrial goods, including “flying cars”, back to economically depressed regions. Whether this will actually happen remains to be seen. Beyond these flash in the pan effects, including an effect on the stock markets, where funded pensions will certainly rise, at least above their nominal value, there is not much to be expected that can generate lasting approval.

I can only think of one exception: the plan for an American Academy. This is basically Donald Trump’s answer to Bernie Sander’s call for tuition-free higher education. Ultimately, it is a more far-reaching demand, even more far-reaching than the partial reduction in student debt that Joe Biden had proposed in view of the crass indebtedness of university graduates. The American Academy combines Trump’s socio-political culture war with the prospect of social advancement for workers. Because he has proposed, or threatened, to punish all universities, especially private Ivy League universities, that have used affirmative action against whites in favor of people of

color, women and other historically underprivileged social groups. Of course, this affects all universities, except the private and Christian right pseudo-universities founded by Jerry Falwell and others. All universities have affirmative action programs that have also made it easier for people of color, women, and other minorities to get into college, receive grants, and get appointments. So how will Trump punish the universities? He plans to tax the endowments, that is, the capital funds of private universities. There is a joke that Harvard and Princeton and Stanford are actually hedge funds with lecture halls attached to them. And Trump wants to tax them and use the funds to create an American Academy that is purged of left-wing liberals and leftists. In this system, hiring should encompass patriotism tests. Workers should be able to earn a bachelor's degree there, free of charge. And this would actually be something that could have a very positive effect on the proletarian electorate.

JPS: *You just mentioned the punitive tariffs. They are an integral part of his program. At least that's what he has repeatedly said. Talks have already taken place with Mexico and Canada. And the German carmakers are also already warming up to get another negative plus in 2025, so to speak, if the tariffs really do happen. Is it really possible to pursue a worker-friendly politics against neoliberal globalization in this way? Because we would think, as you have already mentioned, that this would burden the less affluent segments of the social structure. So how can he promise such a policy and still win a majority? Or was that not so important?*

Solty: Well, on the one hand, it is indeed remarkable that the criticism of free trade is now being formulated by the right. I mean, this was long a specialty of the left, of the anti- or alter-globalization movement of the late 1990s and early 2000s. And it must also be said that the right-wing free trade criticism contains a promise, namely that the cities, towns and states, where companies invest, should benefit from these investments. Of course, this promise is often overstating the actual benefits for society. We have seen this in Germany, where Tesla is investing in Brandenburg, for example. Of course, a company like that doesn't do this by taking over existing employment contracts, unionization or collective bargaining agreements. Instead, it creates its own structures that are union-free and ultimately follow the capitalist logic of profit maximization. Especially in the rustbelt states (i.e., Illinois, Indiana, Michigan, Ohio, Pennsylvania, and Wisconsin), which the Democrats had once seen as their blue wall, this criticism and the promise of trickle-down-economics through tariffs has definitely played a role.

Criticism of decarbonization has undoubtedly played a role as well. I mean, on the surface and with regard to party affiliations, the political map is clear. States on the West and East coast vote for the Democrats. Republicans can't gain any ground there. Everything in between, the "flyover states", vote for the Republicans. But if you look deeper into the map, you see an extreme urban-rural divide. Outside of New York City, Los Angeles, San Francisco, San Diego, or Santa Cruz, in the rural

areas of solid Democratic states, people vote for Republicans. Around Albany, Syracuse or Buffalo, NY, majorities are not the same as in New York City. And this is, of course, related to decarbonization and criticism of the green capitalist transformation, because the price of gasoline in the U.S. is a question of the moral economy (in the sense of E.P. Thompson), in the U.S. it is something like the bread price of the 21st century. As it is common for Americans to commute three hours to work and then three hours back, because people can't afford real estate in the cities, the price of gasoline matters and motivates decarbonization sceptics. So, this is really a situation where such issues have played a role.

Nevertheless, I would say that a consensus on tariffs and protectionist politics exists in U.S. politics. Ultimately, China is the last representative and defender of the Washington Consensus. The last defender of the WTO, even though in 2001 it had to submit to these harsh WTO rules. In this regard, everyone – from Habeck to Joe Biden – is, in a certain way, Trumpist. Biden has not only continued the tariffs Trump imposed on Chinese electric cars and solar panels, but increased them from 25 percent to 100 percent. This means there is broad consensus that reindustrialization is happening through protectionist trade policies. This has been the goal aimed for since the Obama administration, and it's more a question of how this industrialization, the crowding in of investment, should take place. Is it through classic neoliberal economic policy, like the trickle-down approach Trump pushed on behalf of traditional manufacturing? Or through a method like Biden's, with strong Keynesian economic and industrial policy, including the Inflation Reduction Act and the Chips and Science Act? These latter policies also focus on new industries and the hope of being able to compete with China on its own turf of the electric revolution, and not already being at a disadvantage in the competition. This is indeed an important difference: Trump relies on the old strategies of the automotive industry, while Biden focuses on engaging in competition with China, especially regarding the electric revolution. But when it comes to reindustrialization and protectionist tariffs, there is agreement.

***JPS:** Were tariffs relevant to voters? Because I read that shortly before the election, right after the election, and during the discussions with Mexico and Canada, many people were googling who actually pays for tariffs? That reminded me of BREXIT, where people were googling the morning after, 'What is the EU?' So, if this played a role for the voters, did they perhaps feel misled? Or is that talking point only relevant in a discourse bubble attempting to explain how the supposedly 'dumb' Trump voters are making choices that ultimately work to their disadvantage?*

Solty: Well, I think this explanation points to a discourse bubble. I found it remarkable when George W. Bush was elected in 2004 in particularly poor districts, like Lincoln County in Nebraska. Left-wing and liberal commentators including Thomas Frank argued exactly in this way: 'You're voting against your own interests,' which quickly led to anti-democratic conclusions. Not that they wanted to overturn the

general right to vote itself, but still – and we saw the same thing with the BREXIT issue, where pro-refugee left-wing newscasters like Anna Reschke said these were such complex decisions that it wasn't the right way for the general public to vote on them in a referendum. During the transition to Obama, George W. Bush faced the accusation that people voted based on identity and didn't pay attention to the actual policy content. This was also true for Obama, in that the left-liberal bubble essentially stopped criticizing Obama, even though Obama implemented significant austerity measures or pushed the drone war in the Middle East. But they didn't want to acknowledge that because this time the 'good' people, the people they could look up to, were in power instead of "dumb Bush." So, I think this is more of a bubble explanation than a real effect. Also, because this election was more of a populist election – a vote against something, rather than a vote in favor of something.

JPS: *Let's move on to another topic and talk about the cabinet. Donald Trump has nominated a number of rather controversial individuals. Kash Patel is supposed to lead the FBI and would, according to Trump, bring loyalty, bravery, and identity to the Bureau. What do these terms mean for Trump? And what are we to expect from the new FBI leadership and what will be the role of the Bureau under Trump?*

Solty: I think Trump simply has a good understanding of Ernst Bloch. Ernst Bloch once said that the right speaks to people, while the left talks about things. So, for example, when Trump responds to criticism of his personnel decisions by saying that they are based on the person being a "Good American," it's simply a very clever and disarming way of speaking. By now, he has even mastered the kind of language that neutralizes left-liberal identity politics. For instance, when he says he is glad that his new chief of staff is the first woman to hold that position in the White House, he is ultimately undermining the Democrats' fixation on "First this" or "First that" as a pseudo-form of emancipation and egalitarianism.

As for Patel, his nomination alone suggests that Trump 2.0 will be very different from Trump 1.0. The Trumpists are simply much better prepared than they were in 2016. In the U.S., there is much fluidity within government and bureaucracy. Unlike in Germany, where permanent bureaucracies exist that state leaders must contend with – such as a theoretical socialist government suddenly dealing with CDU-appointed bureaucrats who obstruct policies – the U.S. allows for greater flexibility. A newly elected president can fill nearly 10,000 positions. In 2016, a large number of these positions remained unfilled. In 2025, things look very different. Trump has been much quicker in nominating candidates than Biden was in 2020. That's the first thing. And from this, we can quickly form a clear picture of who these individuals are and what they represent. Patel, in particular, strongly embodies the explicit goal of an authoritarian transformation of the state.

We already have a fairly clear idea of Trump's plans through his election manifesto 'Agenda 47'. And there has been much discussion about 'Project 2025,' which Trump

referenced for a long time but distanced himself from after facing criticism. This is a 900-page document from the Heritage Foundation, which also drafted a similar program for Trump in 2016 and later boasted that two-thirds of it had been implemented. There is a significant overlap between Agenda 47 and Project 2025, with the main difference being the position on abortion, where Trump would be fighting against majorities. But overall, Trump is planning an authoritarian restructuring of the state, aiming to significantly expand executive power, and governing through executive orders. He also intends to carry out large-scale political purges, especially in the education sector and the Department of Education, since he correctly recognizes that some of his biggest opponents are there – whether in public education or universities.

Patel plays a role in these plans. Especially, if Trump attempts to carry out mass deportations against the majority's will. In 2017, Trump learned that many of his deportation plans were not implemented because of resistance from state and local authorities, with police departments refusing to enforce orders. He has since realized that he can deploy the National Guard – a reserve military force – for domestic operations. The U.S. has a history of using the National Guard for internal conflicts, particularly in labor-capital disputes, where strikes were violently suppressed. Given the overall violent history of American civil society, this is not unprecedented. However, the National Guard is typically under the control of state governors, meaning Trump could face the same issue in Democrat-led states. But there is one scenario in which the National Guard would come under presidential command – just as Trump now seeks to bring the U.S. Department of Justice under his control – and that is the declaration of a state of emergency.

How could such a state of emergency be declared? It is likely that mass deportations would lead to civil unrest, as the U.S. does not have a national ID requirement. Police cannot randomly stop people and demand identification, as they can in Germany. So, in order to round up 12 million undocumented workers, raids would be necessary in their neighborhoods and workplaces. One can imagine Trump being supported in this effort by emboldened paramilitary groups and far Right militias like the Proud Boys, conducting unauthorized raids in communities. Some cities, such as Aurora, Colorado – where Trump claims Venezuelan gangs have taken control – are already on his “target list.” Historically, however, minority communities in the U.S. have always resisted such actions. The Ku Klux Klan faced opposition, and the Black Panthers emerged in response to similar threats. If mass deportations were to take place, violent clashes would be inevitable, likely resulting in casualties. Such events would go viral, producing footage even more shocking than the killing of George Floyd. This, in turn, could create a situation in which Trump declares a state of emergency, allowing him to deploy the National Guard into Democratic states, conduct mass deportations in the name of “fighting terrorism” and push forward with the

authoritarian transformation of the state – his explicit goal. Patel would certainly play a key role in such events.

JPS: *Can we say that Trumpists try to override the system of checks and balances, for which the U.S. is known, by simply exacerbating conflicts within the population?*

Solty: Well, I don't know if it's a deliberate strategy to instrumentalize social tensions – whether there is actually a grand plan to declare a state of emergency. But many of Trump's demands or plans simply cannot be implemented within the system of checks and balances. For example, revoking birthright citizenship for people born in the U.S. would require a constitutional amendment, which is completely unrealistic. In far-right discourse, there is the concept of "Day X." This describes a point at which democracy, existing in a state of openness, must be overcome. Trump has implied that this might be "the last time" he runs for election. That could simply mean that he cannot run again according to the 22nd Amendment to the U.S. Constitution, but it could also be referring to the 2026 midterm elections. This will need to be closely watched to determine whether we are looking at just an authoritarian tendency within the framework of liberal parliamentarism – or something even more extreme, a further shift toward outright authoritarianism which also seems necessary to compete with China.

JPS: *If we try to make sense of the people Trump has appointed, one question I keep asking myself is: Are these actually loyalists or do people like Pam Bondi or Elon Musk, people with professional careers, actually stand for something? I wonder: How many loyalists does he need? And how many experts does he have to appoint to change something? Take someone like Pete Hegseth, for example. He was excluded from Biden's inauguration as a National Guardsman because he was potentially far-right – or at least wore symbols associated with American right-wing extremists. He was under heavy criticism and running around Washington trying not to lose his nomination. But he was eventually appointed. Could such a nomination and appointment also be read as a signal to the Proud Boys and militias?*

Solty: Looking at the first Trump administration, it is striking how much Trump relied on the old Republican establishment, even though they had fought against him. It was remarkable how the party establishment not only lost the primary to him but also continued to reject and attack him even after he had secured the nomination. At one point 50 Republican foreign policy elites even published an open letter declaring Trump a threat to U.S. national security.

His first victory was a reflection of the populist moment – he won despite the major media outlets being against him. Their criticism only reinforced the political myth around his persona. However, when it came to cabinet formation he largely distanced himself from the forces that had actually secured his victory. Steve Bannon had shaped his campaign around economic nationalism and criticism of free trade, which played a key role in his win, because it won the "Rust Belt" for him. Yet, Trump

struggled to build alternative structures outside the existing system. He did create a separate institution under his trade representative, but the gradual sidelining of Steve Bannon showed how much Trump was ultimately contained by dominant transnational capitalist factions. So this was in his first presidency.

This time, it's striking how much he is relying on people from his immediate inner circle. This, in my view, strongly supports the idea that loyalty is a key criterion. Many of his appointees are people he knows and values from Fox News – this applies to Pam Bondi, for example. As an attorney general, she dropped a legal case against him, which highlights how much loyalty is front and center. That's also an indication of the authoritarian restructuring of the state – Trump seems to believe he needs people he can fully trust.

And you're absolutely right that a lot of this also serves as symbolic politics for the far right. Deporting 12 million undocumented workers is not something the majority of Americans wants. Nor is pushing the abortion issue even further, which means making abortion illegal even in cases of incest or rape, which is something J.D. Vance wants. Many of these positions are less about Trump's personal beliefs and more about signaling to his far-right base.

This is especially evident in his campaign rhetoric, where he has leaned into the "Great Replacement" theory. He has suggested that if the Democrats win, 200 million immigrants will flood the country, bringing about the end of America and the replacement of the white population. As things stand, Trump's network is now even more deeply embedded in far-right and white supremacist circles than it was in 2016, with personal loyalists surrounding him more than ever.

JPS: *At the beginning of the election campaign, there was a podcast featuring Michael Franzese, a former mafia boss, and Andrew Tate, the masculinist influencer. They spent a long time discussing the idea that "if Harris wins, it will be because they let millions of illegal immigrants into the country, and now they're voting for them. And then even more will come." They had already framed a potential defeat in this way in advance, and the reaction in the YouTube comments was shocking. To what extent has this alliance with right-wing YouTubers and media figures grown organically from civil society? Or is it something that the Republican Party or Trump's inner circle has politically constructed and orchestrated?*

Solty: Well, first of all, it's worth noting that the Democrats themselves have reinforced this theory – but in a positive way. Since Obama's election, and especially in the 2012 presidential and midterm elections, the Democratic strategy has been based on the idea that demographic change will secure them a path to permanent victory.

Their narrative was: *"Republicans will never return to power because the country is becoming less and less white."* The assumption was that as the proportion of Black, Latino, and Asian American voters grew to over 50% of the population, Democrats would hold a permanent structural majority. This concept was once called the

“demographic schellacking” of Republicans. It was a central election narrative when democrats won in 2008 and 2012.

But that theory has since fallen apart. We now see that Trump made significant gains not only among white voters. It wasn't just a majority of white men or white women who supported him. The biggest inroads he made, despite his ultra-racist and ultra-masculinist rhetoric, were among Latinos, he won a growing share of Black voters and had significant increases among Asian Americans. Even the small but politically relevant population of Native Americans that survived the genocide overwhelmingly leaned toward Trump.

As for whether the connection between Trump and the far-right media scene is organic, Trump's real success has been his ability to communicate outside the mainstream media. There are reasons why Max Weber looked to the U.S. while he was developing his argument about charismatic rule and how acclamation works. This was already evident during Trump's first presidential campaign, when he had 45 million social media followers and could bypass traditional channels. And this certainly creates a dynamic, where his relationship with right-wing media figures isn't just strategic – it's also shaped by his own media consumption habits. It's an acclamatory, almost symbiotic relationship.

JPS: *To follow up on this point: One possible interpretation of this theory is that there's a propaganda apparatus, but it's now structured differently – more decentralized. It's not housed in a Ministry of Propaganda or a campaign headquarters but instead growing more organically from the right-wing civil society. We see similar trends in Germany. If we look at the YouTube faction supporting the AfD or consider the influence of figures like Joe Rogan – it's clear that these platforms are shaping political discourse. But you wouldn't necessarily consider this a coordinated effort? I keep wondering about this.*

I recently watched a documentary about Trump's first term and the January 6 events, where the then-leader of the Proud Boys, Henry „Enrique” Tarrio, said something interesting. He suggested that they weren't just printing all the T-shirts that Alex Jones was selling; they were probably printing most of the pro-Biden T-shirts as well. So maybe this isn't even entirely about political ideology. Perhaps for someone like Alex Jones, Joe Rogan or Andrew Tate, it's just about making money.

Solty: I mean, we already saw this dynamic with the Tea Party. Plenty of entrepreneurs jumped on board simply because it was a lucrative business. The same applies to the evangelical right – many of them are essentially religious entrepreneurs.

As for the broader connections, it would certainly be interesting to analyze how Fox News' guest policies have evolved over time. We now see right-wing figures getting airtime that they wouldn't have gotten eight or ten years ago. I can't say for certain, but I imagine there are some fascinating empirical findings to uncover.

JPS: *Let's turn to international politics. In your opinion, is there any reason to believe that Putin harbors imperialist ambitions beyond Ukraine? Would he continue advancing into Europe?*

Solty: I consider this to be one of the most disastrous liberal narratives we're dealing with. The liberal narrative is ultimately discourse-theoretical or philosophically idealistic – it derives actions from words.

For instance, people take Putin's speeches in which he denies Ukraine's right to exist, promotes an ethno-nationalist vision of Greater Russia, and is said to want to restore either the Soviet Union or Tsarist Russia. From this, they conclude that he will make claims on any country with a significant Russian-speaking population – places like the Baltic states, Georgia, and so on – and that he especially wants to erase Ukraine.

And yes, these speeches do exist. But Russia's military strategy offers no indication that this was ever the real objective behind the illegal invasion of Ukraine. Militarily, it would be sheer madness to attempt to pacify a country spanning more than 4,000 square kilometers with 44 million inhabitants (at the time), using only 190,000 troops.

This idea of ethno-nationalist, Greater Russian expansionism is, in my view, mostly folklore – propaganda for the home front. The actual military strategy suggests only three realistic objectives:

1. The stabilization and annexation of larger parts of Donbas – for which territorial maps have already been redrawn.
2. The land bridge to Crimea and
3. The push toward Kyiv, which seem to indicate an attempt at regime change. The assumption was that Ukrainian forces would collapse, that Zelensky (as the West had advised) would flee the country, creating a power vacuum in which a pro-Russian president could be installed to ensure Ukraine's political neutrality.

I see this as one of the most destructive narratives because it fuels fear – the same fear that has led to Europe's internal militarization and the public's active consent to war policies. People buy into the fearmongering, as seen with Boris Pistorius' claim that Putin could soon be standing in our backyard. And that is genuinely dangerous.

JPS: *One could ask a similar security policy question regarding Israel. Benjamin Netanyahu is clinging to power by prolonging a war – one that not everyone in Israel wants to fight, not the elite, not even the military. Maintaining power through war is a possibility.*

Solty: Lenin called this *Jingoism*, Charles Beard a "strategy of diversion." And this strategy plays a role in Russia as well. I used to say that if one really hates Putin and one truly wanted regime change in Russia – if democracy and human rights in Russia were a real concern – then one would need to pursue détente. That would allow internal societal contradictions to play out, leading to change.

It is quite remarkable that after the Yeltsin years and the disasters of shock privatization and national decline, Putin positioned himself – much like the early Soviet leadership – at the helm of a project to elevate the economy using surplus revenues from natural resources. There was an effort to develop a digital economy. And as long as resource prices were rising (until the global financial crisis), this approach worked. But once resource prices collapsed, neoliberal measures became increasingly necessary. The most drastic example was the pension reform of 2018-2019, which raised the retirement age from 50 to 55 for women and from 55 to 60 for men – despite “Russia’s mortality crisis”, as medical sociologists at Lancet have called it.

External conflicts can serve the purpose of maintaining power. The pension reform, for example, was opposed by nearly 80% of the population, led by resistance from the Communist Party. Yet, at the same time, 80% of Russians supported the country’s foreign policy stance.

At the outset, war always consolidates power internally. But the *dialectic of war* is that, over time, it becomes destabilizing – especially as its consequences hit home. Families suffer from casualties, injuries, disabilities, trauma. Economic hardship follows, with inflation, hunger, and the rising costs of war. Unsurprisingly, then, history shows a strong link between war and revolution – whether it was 1871, 1905, 1916-1918, during World War I, or the wave of decolonization after 1945. War often leads to the erosion of power. That’s why Putin has consistently avoided general mobilization – instead opting to send criminals, ethnic minorities from remote regions, and the poorest to fight. He wants to prevent backlash in cities like Moscow and St. Petersburg.

Looking at the world and international relations, I believe that none of today’s conflicts can be understood without considering the U.S.-China rivalry. That is the defining question of the 21st century – the relative decline of U.S. dominance and the question of whether China can rise peacefully. The U.S. is actively trying to block China’s ascent. Therefore, all conflicts have immense potential for proxy wars and escalation. And Trump was never the *peace angel* that many leftists imagined him to be. And the theory that *Democrats start wars, and Republicans end them* does not apply to Trump.

- If it were up to him, Trump would have launched a war against Venezuela.
- He wanted war with North Korea and Iran – and was only stopped by the Pentagon or Tucker Carlson on Fox News.
- He was also responsible for moving the U.S. embassy to Jerusalem, setting the stage for annexations in Israel.

Now, Israel’s far-right is emboldened, hoping for support from neoconservative supporters within the American establishment. They are actively planning a preemptive strike on Iran’s nuclear program, and the recent assassinations of Hezbollah leaders in Lebanon may have been a test run for this. If that happens, we could very

quickly find ourselves in a full-blown proxy war. Iran is allied with Russia, and Israel is backed by the U.S. This is precisely what has already been unfolding in Syria, where tensions are once again rising.

JPS: *How can we explain the fact that the German left – departing from its tradition in the peace movement – has increasingly aligned itself with the interests of Western imperialism, as seen in the conflicts in Gaza and Ukraine? Is this a conscious process?*

Solty: I think this has many aspects. A major overarching factor is that, after the era of bipolarity, many conceptual frameworks from the Cold War disappeared – such as the understanding that even the greatest enemies could establish collective security because neither side wanted to engage in nuclear war. After the end of the Cold War, the West no longer had to exercise restraint in expanding NATO in Europe or in pushing free trade projects and similar initiatives. That's a broad, overarching aspect.

But I believe there's also an internal factor within the left itself, which I call the loss of internationalism. Now, many would argue that their solidarity with Ukraine, including support for arms deliveries, is precisely an expression of international solidarity – that they are not leaving Ukraine to fend for itself. But I mean something more profound.

Last year, I wrote an essay about Rossana Rossanda and was deeply impressed by the way she framed her own political struggle – the fight for revolution in Italy – within the context of international power relations. In 1978, she organized a conference with major figures like Althusser, discussing the post-revolutionary society. She harbored no illusions about the Soviet Union or the People's Republic of China – she called them *post-revolutionary*. Yet her goal was always world revolution, with a focus on revolution in the West.

She asked: *Why did the revolution succeed in Cuba but fail in Chile in 1973?* And she concluded that this depended on how the great powers acted. And she applied this reasoning to Italy: *How do we prevent Italy's attempt at revolutionary transformation from turning into another Chile?* – recognizing that it depends on the behavior of global powers.

This way of thinking about foreign policy not in moral terms but in terms of relationships of forces and windows of opportunity for socialist struggles marks a seismic shift in how the left today approaches these issues. What we have seen for a long time have been romanticizations – especially of Latin American countries – and demonizations. But the left no longer sees its own actions in relation to these states; instead, they become mere projection screens. With regards to the Latin American pink turn, people admired these movements for achieving what seemed unattainable in the West. And when things went wrong, they simply said, “*Well, that was never real socialism anyway.*”

This loss of internationalism, which still existed in the anti-globalization movement, began around the mid-2000s when the neoliberal hegemony started to erode.

The question arose: *Would right-wing populism provide the main response to this erosion, or could the left harness emerging social contradictions to its advantage?*

Ultimately, the left turned inward, focusing on domestic social issues. And for a long time, this approach was successful – it was a condition for the left's political success. Foreign policy was avoided because it was always the bottleneck for participation in government. For this reason, figures like Giorgia Meloni and Marine Le Pen repositioned themselves within the Western order, seeing it as their only viable path to power. And it worked: Bernie Sanders could not be sidelined the way Jeremy Corbyn was. Corbyn remained committed to internationalism and was ultimately neutralized with accusations of antisemitism, preventing his bid for prime minister. With Sanders, this strategy was tried but failed because he had almost exclusively focused on domestic class struggles in the U.S.

But with the war in Ukraine, this strategy backfired on the left. Suddenly, they were unable to understand the nature of the conflict and ended up becoming appendages of their own government's moralistic foreign policy. I ask myself: Why are leftists and left-liberals applying double standards to Ukraine? If one argues that Russia's invasion of Ukraine is a violation of international law, then, under the principle of self-defense, Ukraine has the right to receive military aid. But if leftists truly adhered to this principle, then they should have demanded weapons for Syria and Iraq to defend against NATO ally Erdogan, who is conducting military operations in northern Syria and northern Iraq – doing exactly what Putin is doing in Ukraine. They should have called for arming the Yemenis against Saudi Arabia's war. Palestine is recognized as a state by most of the world, so they should have advocated for arms deliveries to Hamas or the PLO to resist Israeli occupation.

Again, I ask myself: *Why are leftists so principled about Ukraine but not about these other cases?* And in my view, there are two possible explanations:

1. The left is racist. They sympathize with Ukrainians because they are European and white. This would explain the double standard. But no leftist wants to be accused of racism.
2. The left has consciously made itself an appendage of its own government and Western imperialism.

I believe the latter is the case. Since the 2021 German federal election, the left has stopped believing in its own narratives – even in positions it previously recognized as true. Even Gregor Gysi, up until 2014, argued that Ukraine was economically divided and that the tug-of-war between Russia and the West was tearing the country apart. He said that NATO's eastward expansion was a mistake, that excluding Russia from the EU's Eastern Partnership was a mistake, and so on. But suddenly, on February 24, 2022, the left no longer wanted to acknowledge any of this. I explain this as a crisis of confidence – a result of the catastrophic 4.9% election result, which left the German left party deeply shaken.

Interestingly, there is a difference between the U.S. and Germany. In the U.S., the Sanders Democrats faced a similar situation: in order to push their domestic agenda, they went along with nearly everything Biden did on Ukraine, and most of what Biden did in the Middle East. This, too, is a consequence of the inward turn that resulted from the loss of internationalism.

JPS: *Let's talk about some other issue related to the wars in Ukraine and Palestine and Israel. Looking at the arrest warrants issued by the International Criminal Court against Netanyahu and Galant, one wonders why aren't there similar warrants against Putin for his attack on Ukraine, or Erdogan and Assad for what they did to the Kurds in Syria? This points to a broader question: Is there no place for a principle-based foreign policy. And is policy solely driven by interests, even in major institutions whose goal should be to prosecute all those involved in violations of international law and war crimes?*

Solty: A thought on this: First, we need to explain why the approval for arms deliveries and solidarity with Ukraine – although one might ask, how “solidary” is it to support forced conscriptions? – was much greater among the left-liberal spectrum than among conservatives. One explanation could be nationalism. Within the AfD sphere, there is an attitude of: Why should I risk a nuclear war for people my grandfather once enslaved? – referring to Ukraine and the Nazi Generalplan Ost. That certainly plays a role. Another factor is that left-liberal governments – Biden, the Democrats, and Germany's Ampel coalition – are the main actors supporting Ukraine. But that alone doesn't fully explain it.

I actually think foreign policy is interest-driven and should be talked about as such. Because interests are negotiable. They can be balanced. When foreign policy becomes morally charged, it turns into a battle of the Shire versus Mordor, the Rebel Alliance versus the Death Star, or Harry Potter versus Voldemort. And this leads to liberal extremism, where the end justifies the means.

In Germany we see this most clearly in the Greens, who are effectively, even though they would never admit it of course, pushing for total war. It was no coincidence that Eva Illouz, on the 80th anniversary of Goebbels' infamous “Total War” speech, gave an interview in *Die Zeit* titled “*I Wish for Total Victory*”. That kind of logic is at play here. In a book chapter, I once described the Ukraine war as left-liberal. I didn't mean that polemically. Rather, I believe the war taps into three fundamental emotions within the left, which explain both their hesitation and their proactive militarism and patriotic fervor:

1. The Anti-War Sentiment

- If you have no understanding of security policy or geopolitics, then the historically left-wing anti-war instinct naturally turns against Putin, because Russia is waging war in Ukraine. This war must be stopped. This feeling is deeply rooted.

2. Antifascism

- Putin embodies everything the left rejects:
 - Russia is an autocracy.
 - It persecutes trade unionists, political opponents and LGBTQIA+ people.
 - It implemented neoliberal reforms.

3. Its economic model, based on fossil fuel and arms exports, is based on climate destruction and war.Solidarity

- Even though the left has abandoned internationalism and no longer understands imperialism, there remains a belief that solidarity means helping the weaker party – which, in this case, is Ukraine.
- Solidarity is now defined as supporting whatever the Ukrainian government demands, overlooking when that government sends its working class against its will into the meat grinder.

To challenge this, we need to cut through this emotional wall with arguments.

The emotional attachment may also explain why so many leftists still refuse to admit their mistake – which, in my view, was becoming accomplices to their own imperialism at the start of this war, which, if you know its pre-history, has had all the elements of a proxy-war for a long time.

***JPS:** If we strip internationalism of its socialist-communist heritage, then identifying with Ukraine or Israel is still a form of internationalism – but one based on projecting one's own desires onto distant regions. I think the analogy between leftist thinking and Lord of the Rings or Harry Potter is quite a good observation. These dynamics follow the patterns Adorno and Horkheimer describe in their chapter on the culture industry, because these narrative structures shape how people think.*

Solty: What I find interesting is that in a neoliberal fragmented society, there is still a desire for a life beyond Homo Oeconomicus. And war might serve as a unifying force for a country. But other ways and strategies exist as well. Take, for example, the mandatory service that German President Frank-Walter Steinmeier wants to reintroduce to strengthen social cohesion. This might lead to interesting new developments: Some people might become communitarians, seeking new forms of collective belonging. Others, shaped in their identity by neoliberalism, might become the deserters of tomorrow – refusing to recognize society or the state altogether.

The German picture gets interesting when consulting polling data on who would actually defend Germany with a weapon. Actually, no other party's supporters are more in favor of arms deliveries than those of the Greens. At the same time, no other party's voters are less willing to personally take up arms to defend the very values

they claim to stand for. In the first *Stern/Forsa* poll of December 2023,⁸ only 9 percent of Green voters said they would fight.⁹

JPS: *That's fascinating from a domestic political perspective. I can't remember the last time I saw such a huge gap between public opinion and the actions of the political elite.*

Solty: That's true, but this issue has always divided elite and masses. There has long been a consensus among international political elites that Germany must rearm and that the country, as an economic giant, cannot afford to be a foreign policy dwarf. This, I think, explains why rearmament has been carried out step by step, in a "salami tactic". The decision to rearm was already made in 2021, but in 2022, it was rebranded as the *Zeitenwende* – because the moment was seen as a great opportunity. However, the elite-mass divide has always existed. In 2014, it became so stark that the German newspaper *Die Zeit* published an article by one of their transatlanticist editorial board members, asking why the masses – especially in East Germany, but not only there – were rejecting the official narrative. The authors even questioned whether the media had been too critical in the past – reporting too much on issues like NSA surveillance, Abu Ghraib, Guantanamo, U.S. torture prisons in Eastern Europe and the war in Iraq in general. I remember this article and the argument because it was a rare moment of transparency, which allowed a glimpse behind the curtain where media and political establishment actually operate.

JPS: *How would you relate these observations to Donald Trump's election victory?*

Solty: It is a fact that the left-wing political spectrum – once encompassing Greens, Leftists, and Socialists – has fragmented over the decades. Looking ahead, in my view, left-wing liberalism will have to justify itself in light of the horseshoe theory. Obviously, there is a widespread fear of the rise of the right, leading to a willingness to support authoritarian policies, including military measures, in the name of defending democracy. All this is framed as the battle of democracy vs. autocracy.

This is the absurd part of the new war ideology: It claims that democracy must be militant against autocracy. Thus, internal dissent is usually framed as coming from external autocratic forces – e.g., Putin manipulating elections, China spreading narratives. Ultimately, this perspective labels all opposition as a "fifth column." This logic feeds into the horseshoe theory, justifying a militant democracy internally with measures like the "loyalty to the constitution" tests for public servants in Brandenburg. Or look at the dual citizenship debate. In this regard, SPD politicians, who compared a meeting between German and Austrian rightwing populists and identitarians in January 2024 to the Wannsee Conference, are now proposing to revoke dual citizenship retroactively for up to ten years in cases of antisemitism.

8 <https://www.stern.de/politik/deutschland/umfrage--nur-17-prozent-der-deutschen-bereit-zur-landesverteidigung-mit-der-waffe-34301080.html>

9 Edit: In the most recent poll of March 2025, that number rose to 10 percent. <https://www.stern.de/news/umfrage--17-prozent-der-deutschen-bei-angriff-zu-verteidigung-mit-waffen-bereit-35527170.html>

Now, in relation to Trump, I think the following observations are crucial. With regard to Israel and Palestine, Trump is obviously pro-Netanyahu, which is causing political shifts within the right. We've already seen Le Pen and Meloni align with the Western alliance – a move facilitated by the Gaza conflict. Why is this so, one may ask? Because Israel's enemies are also the far right's enemies. Israel frames the conflict as civilization vs. barbarism – and from this perspective, "the barbarians" are the Muslim populations of the Arab world. This aligns with Björn Höcke's "remigration" project, where he calls for pushing Islam back to the Bosphorus.

For now, within the AfD, the Krah-Höcke faction is still influential. And they cling to the New World Order theory, while promoting at the same time a classic anti-American stance, likely for electoral reasons – since Eastern Germany remains skeptical of the West and the USA, shaped by post-1990 experiences. However, pressure is growing on the far right in Germany to align with the Western alliance – not just because of the "Melonization" of the AfD as a power strategy, but also because Le Pen, Meloni, and Trump are setting a precedent – figures they admire and want to ally with. And because the Gaza conflict provides an opportunity to position themselves within the Western bloc and overcome the Holocaust guilt they loathe. If the AfD now claims to defend Europe's Judeo-Christian heritage against "Afrikanism" and "Orientalism", it becomes harder to hold them accountable for Holocaust denial and their extremist positions. So, there are strong forces keeping the Krah-Höcke faction in check – and Trump's pro-Israel stance could play a key role in this shift.

JPS: *If Trump integrates into these networks, we can ask the question that is always somewhat implicitly on the table: Does Trump qualify as a fascist under mainstream fascism theories?*

Solty: The recent surge in fascism discourse is linked to the rise of a discourse-analytic approach – which focuses on: Manichean thinking (good vs. evil), friend-enemy dichotomies, and in-group vs. out-group dynamics. However, this overextends the definition of fascism, and it leads to absurdities, when even critical psychologists like Klaus Weber label Sahra Wagenknecht as fascist. Why is this so, one may ask? Because they define fascism purely through discourse, arguing that it: breaks with universal human rights and represents a radicalization of conservatism. But this doesn't explain fascism's societal function.

Historically, we've seen two flawed hypotheses: First, there is Lenin's view that democracy is capitalism's best disguise, while authoritarianism is not a capitalist form. But this hypothesis fails to explain why liberal democracy collapsed in the 1930s (except in the US and UK). Secondly, there is the 1930s critical Theory's hypothesis that fascism is capitalism's "ideal" form. Now this hypothesis fails to explain why democracy flourished after 1945. Clearly, capitalism shifts between periods where it favors authoritarian states and periods where liberal democracy is the best model. This raises the question: How functional or dysfunctional is today's far right?

Historically, the NSDAP was functional for nationally organized capitalism (e.g., Thyssen, Krupp). But neoliberalism globalized capitalism, shifting dominance to transnational capital factions. Capital export today isn't just short-term investments, but foreign direct investment (FDI) – this has become the dominant force, in particular in strong states. Against this backdrop, the AfD has remained dysfunctional for capital. As long as the AfD rejects the Euro, which serves as a springboard for German industry (Bosch, Siemens, Daimler, BMW, etc.), and as long as the party rejects NATO, which secures global trade routes and foreign investments, it cannot become a partner for Bosch, Siemens, Daimler, and BMW. Globally, the far right was never really a partner for global capitalist endeavors. This explains, for instance, why Trump was largely opposed by Fortune 500 companies in 2016, despite the tax cuts promised for corporations.

If we use the fascism concept, we should adopt Griffin's differentiation between fascism as a movement and fascism as a state form. Certainly, fascist movements can emerge from capitalism's contradictions. Referring to Poulantzas, we can argue that fascist movements gain strength when circumstances worsen and become unbearable. The conditions are moving in this direction, as capitalism faces a prolonged crisis, and the left is too weak to offer an egalitarian way out of this crisis.

Overall, we are experiencing a renationalization of capitalism, a deglobalization so to speak, at least in parts. And this could possibly also entail a new functionality for people like Trump. That is where it becomes interesting. Perhaps, we do not need to call the new state form fascist. This state will certainly still rely on elections, but also on centralization of executive power. And there are reasons for this centralization. Because liberal parliamentarism is increasingly less capable of competing with China. China has proven to be hyper-competitive after the global financial crisis. The austerity policies in the West were completely inferior to Chinese state interventionism. China's industrial policy was vastly superior to that of the West, which explains China's competitiveness. The West then tried to beat China at its own game, by implementing new industrial policy. Examples are the EU Climate and Transformation Fund, the EU Chips and Science Act, or the Inflation Reduction Act in the US. But it is becoming evident that neoliberal debt brakes and similar instruments make it difficult to beat China at its own game. There is no best practice and liberal parliamentarism acts in some instances as a brake when it comes to taking on the competition with China. Certainly, we observe growing disillusionment with democracy from above and below. We already saw this during the global financial crisis, when neoliberals spoke of the ungovernability of democracy, and a discourse on the dysfunctionality of liberal parliamentarism took roots. And I believe this is intensifying under the conditions of competition with China. That means a situation could arise in which people like Trump actually become functional when it comes to the new bloc confrontation.

DEBATE

Remembering Michael Burawoy (1947-2025)

Gay Seidman*

Keywords: Burawoy, Marxism, Public Sociology, Obituary, Berkeley, Manufacturing Consent

On Monday, February 3, 2025, the world lost Michael Burawoy, a brilliant scholar of the sociology of labor, political sociology, and social theory, in a hit-and-run car accident near his home in Oakland, California. As the global community that he helped to construct learned the shocking news, the internet was flooded with comments mourning the loss, and recognizing the impact of Michael's many contributions on the discipline, as well as on the lives of his students, colleagues and friends.

Over the course of his career, Michael published more a dozen books, and dozens of articles, contributing to the sociology of work, political sociology, and social theory, as well as to public debates about the relationship between scholarly sociology and activism. During the nearly 50 years that he served on the University of California at Berkeley faculty, Michael advised more than 80 doctoral students, chaired his department twice (1996-8, 2002-2003), served as president of the American Sociological Association (2003-4), and then served as president of the International Sociological Association (2010-2014).

Michael's contributions were widely recognized during his lifetime. He received the ASA's W.E.B. Du Bois Career of Distinguished Scholarship in 2024, which came on top of the ASA Marxist Section's Lifetime Achievement Award in 2020, and the Berkeley Citation, one of the university's highest awards in 2021.

Those who knew Michael in his earlier years probably would never have predicted that he eventually would become one of the world's most visible sociologists. Born in 1947 to Hungarian Jewish refugees who fled to Britain as the war loomed over Europe, Michael majored in mathematics at Cambridge, and, as a rather reserved

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young nerd, probably would not have seemed likely to emerge as the energetic, engaged scholar-activist and community-builder that so many of us remember.

But after taking a few college courses in sociology, Michael decided to explore the world, heading off to Africa after he graduated in 1968. What began as a gap-year adventure ultimately would become the cornerstone for Michael's lifelong interest in labor studies, and also, in theoretical debates about class, race, and social change – especially after he became engaged with a group of sociologists and anti-apartheid activists in South Africa, whose friendship and conversations would deepen his interest in Marxist theories, and in the region's racialized migrant labor system.

Traveling north, Michael enrolled in the University of Zambia's brand-new sociology master's program, and also took a part time job in the personnel office of Zambia's major copper-mining company. In the first of what would become a career-long series of ethnographic workplace studies, Michael later published *The Colour of Class on the Copper Mines* (1972), analyzing the dynamics that maintained the mine's racialized labor system, despite independence, and even though the mining company had been nationalized by a new government which claimed to be committed to ending colonial-era segregation. Michael's clear description offered remarkable insight into why change was so slow, pointing to persistent pressures that led the new state, and organized labor, to collaborate with the South African-owned company that still ran the mine.

The report prompted a heated debate in Zambia – and also raised larger questions about work, politics, and social change, which Michael continued to explore for the rest of his life. With a master's degree in hand, Michael moved to the University of Chicago to pursue a doctorate under the supervision of William Julius Wilson. For his dissertation, he worked as a semi-skilled machine operator in a South Chicago factory; in the book based on his thesis, *Manufacturing Consent* (1979), Michael described the way workers' compliance, and resistance, was shaped by the informal norms and explicit pressures – not only from fellow workers, but also from the company, the union, and the state. Still viewed as a classic work in labor studies, Michael's focus on specific details of what he called the *labor process* – the daily experiences of workers, shaped by the specific context in which they find themselves – was immediately recognized as a major contribution, and continues to have enormous impact on labor studies today.

In 1976, Michael joined the faculty at UC Berkeley, and by the late 1980s, he had expanded his approach, adding theoretical, historical and comparative analyses, as well as ethnography, to his repertoire. Over the next four decades, Michael would explore an extraordinary range of issues around the world, from migrant labor in California, to changing labor relations in post-communist Hungary and Russia, to surging popular protests in post-apartheid South Africa.

But, as anyone who met him could see, Michael's interest in sociology, and the world, extended far beyond the workplaces he studied. By the early 1990s, he was still doing ethnographic work, but he also began to write more specifically about methodology, insisting that qualitative methods offer a very different kind of insight. Prompted in part by his concern that the work of his graduate students and junior scholars would be dismissed by more positivist social scientists, Michael began making the case for what he came to call the *extended case method*. Ethnographers, he argued, can use their observations in specific contexts to highlight dynamics which have might been overlooked by classical theories, or to explore how different histories, and different contexts, might shape social processes in ways that classical theories might never have predicted. Instead of using general social theory to analyse reality, specific cases could be used to challenge classical theoretical assumptions, and perhaps, to change the way we understand the world.

Like many of Michael's insights, he always attributed the emergence of this new framework for thinking about the impact of single cases and of qualitative work, to his interactions with his students, at both the undergraduate and graduate level. As many of his former students pointed out at the retirement celebration hosted at Berkeley in 2023, engaging with Michael often proved lifechanging – for undergraduates, but perhaps even more for his dozens of doctoral students, who counted on Michael not only for insights, warmth, and humor, but also for thoughtful mentorship, his detailed feedback and generous support. Michael's deep, energetic commitment to teaching was always an important part of his work, and it had enormous impact on those around him; as his colleague Mara Loveman described in a moving tribute after his death, the intensity with which he listened, and responded to, students' comments and questions, both in classes and in private, was remarkable: throughout his career, he insisted that he learned as much from his students as he did from them, often suggesting that students' questions were what made him rethink old assumptions, and pursue new directions in his own work.

And although Michael always enjoyed having time to himself, he was also remarkably sociable, always willing to share ideas and discuss projects with his colleagues and friends. His graduate students could count on him for detailed and thoughtful comments, including in the regular workshops he hosted for his advisees; he created a space where students could share drafts of their work, benefit from each others' insights, and also, learn to offer constructive criticisms.

Of course, Michael's energetic engagement with the world went far beyond the classroom. Especially as he became involved in the leadership of both his own department and broader sociological associations, and as he built ever-stronger relationships with sociological communities from South Africa to eastern Europe, to Brazil and beyond, Michael pushed the discipline to recognize the value of that broader engagement. Ever the globe-trotter, he built an extraordinary network of

friends and collaborators, creating a network of sociologists who shared his activist leanings, and who were involved in movements for social change as well as scholarly research, including well-known scholar-activists like his close friends Erik Olin Wright and Eddie Webster.

As a young Marxist, Michael had always been sympathetic to activists, but as he became more visible in the discipline, Michael began to use his position and his visibility to defend junior scholars, increasingly urging the discipline to recognize the value of what he called *public sociology* – that is, sociological projects that do not simply study the world, but try to change it. Insisting that if sociology does not engage with, and contribute to, the real world, the discipline loses its bearings, and its purpose, he argued that instead of assuming that engaged scholarship would be biased, academia should respect scholars' involvement and concern; while scholars need to be open to what Weber called *inconvenient fact*, Michael also pointed out that scholars' engagement can also open the possibility of new insights, and often leads to significant intellectual contributions.

Another side of his campaign to promote *public sociology* stemmed from his desire to make the discipline more relevant to public policy debates. During his presidential terms at both the ASA and the ISA, he helped to create new spaces where sociologists could publish short, readable summaries of their work, supporting the creation of the ASA journal *Context* and the ISA journal *Global Dialog* as sites that might make academic studies more accessible to broader publics, as well as to other sociologists.

Importantly, he also insisted that these projects should also work to expand the discipline's perspective – especially, to bring in sociologists whose work might otherwise have been overlooked, often because they reflected the experiences of the global South, or because they focused on more marginalized corners of society.

Over time, these projects led Michael to become even more insistent that sociology, and sociologists, need to be engaged in the real world, rather than simply engaging with the classic theoretical canon. That vision is perhaps spelt out most clearly in what is effectively Michael's intellectual autobiography, *Public Sociology* (2021) – summarized in a line he claimed was an *adaptation* of a line by C.L.R. James and Rudyard Kipling: "What do they know of sociology, who only sociology know?" Describing how his understanding of sociology, social theory, and the relationship between theory and reality changed over the course of his career, Michael repeatedly emphasizes how events in the real world prompted him to take up new questions, and to explore new theoretical directions.

In the concluding chapters of *Public Sociology*, Michael describes one of those shifts – one that was perhaps both predictable, and completely unexpected. While he always loved biking, hiking, and watching Manchester United soccer matches, Michael was also a workaholic, always interested in new topics and issues. No one who knew him would have expected him to simply relax and retire after he retired

from Berkeley in 2023. So perhaps it should not be surprising that when students asked him to teach a course on the revered activist and scholar WEB Du Bois, Michael became immersed in revisiting Du Bois' work; especially during the protests that broke out after George Floyd was killed, he became firmly convinced that sociology needed to shift away from classical theory. The discipline will only remain relevant, he writes, if sociologists engage directly in the challenges of the present – while also trying to identify, and construct, paths that might lead toward a more just and humane society.

Taking up the challenge that he had posed to the discipline, he continued to work on several projects in the years after he retired. In the lecture series and articles in which he discusses Du Bois's contributions, in an edited collection honoring the work of Erik Olin Wright on *real utopias* and in the papers he was working on just before he died, he repeatedly reminded readers that sociologists cannot pretend they are neutral as they study the world that they inhabit. As he wrote in an unpublished paper, a week before he died, "as Max Weber (1949) maintained – contrary to faulty interpretations – social scientists cannot conduct their investigations without taking a standpoint. To study the 'infinite manifold' that is the world we need to select in order to interpret. Moreover, social scientists are no different to anyone else, their actions as researchers are guided by the values they adopt. To refuse to take a stance is a stance itself, a stance in favor of the status quo."

Less than a week after the shocking news of Michael's death spread around the world, more than 300 people logged on to pay tribute to him in an event organized by the ISA. Colleagues, former students, and close friends joined in, mourning his loss, but also celebrating Michael's energy, his insights, and his generous mentorship. The words that Sari Hanafi, a former ISA president and close friend of Michael's, posted on the ISA website will resonate with all who knew him:

"Michael, you were not just a theorist. You reshaped the very practice of sociology, making it urgent, engaged, and alive. Your ideas do not die. Your presence does not fade. You are not gone; you are inscribed in every struggle for truth, every act of intellectual courage, every fight against injustice. I grieve this immense loss. But I do not say goodbye."

Or, as an old saying puts it: Michael's memory will always be a blessing. He will be sorely missed, but even those sociologists who are not lucky enough to carry memories of his warmth, his energy, and his generosity, will be inspired by his work, for decades to come.

STUDYING POLITICS BY OTHER MEANS

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ISSN: 2950-2144

E-ISSN: 2950-2152

Radboud University



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