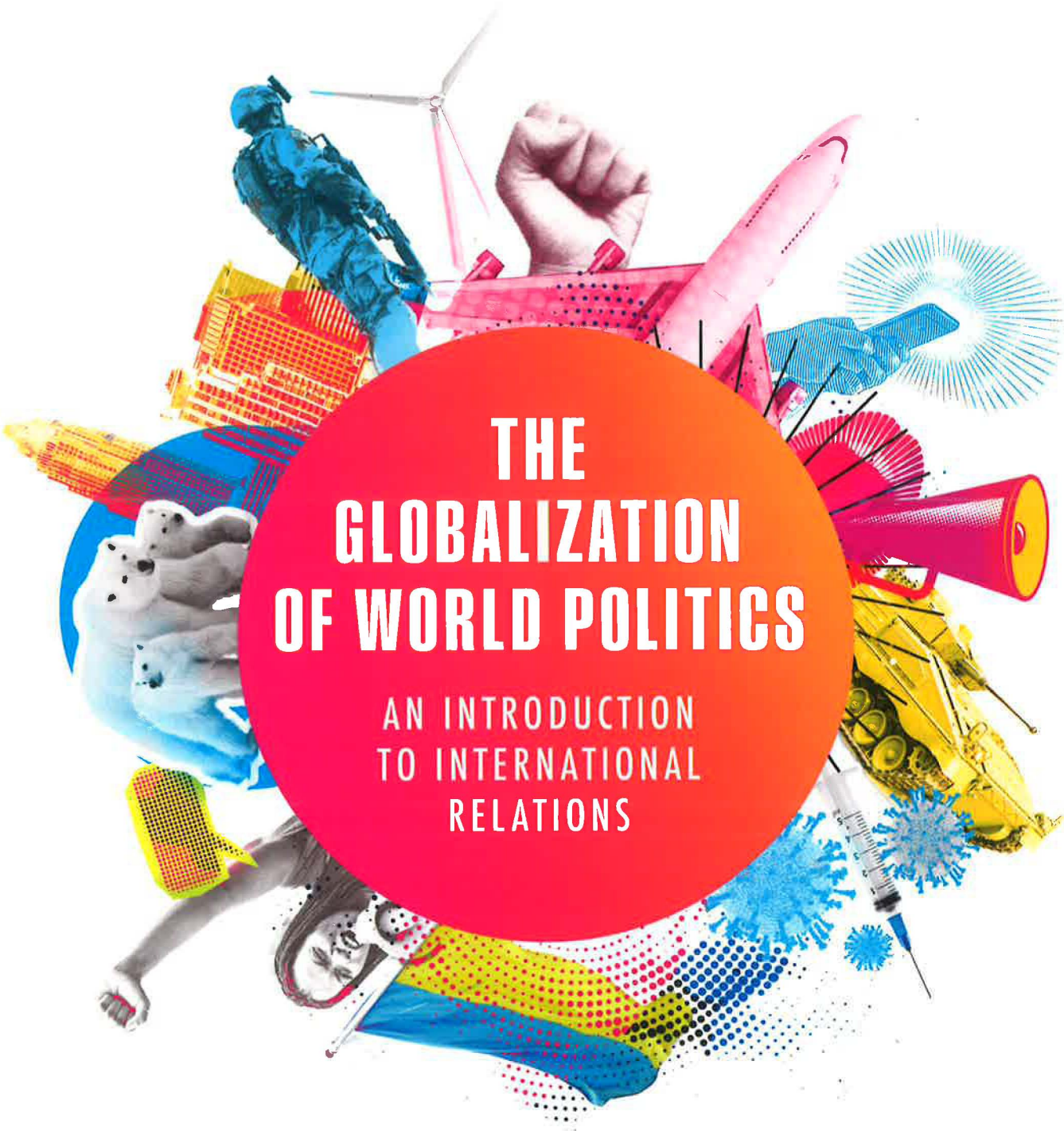OXFORD

THE GLOBALIZATION OF WORLD POLITICS

AN INTRODUCTION TO INTERNATIONAL RELATIONS

9th edition

JOHN **BAYLIS** | STEVE **SMITH** | PATRICIA **OWENS**

the early nineteenth century and shows how many of the flaws in the current global order have causes that reach far back into history.

Morefield, J. (2009), *Covenants without Swords: Idealist Liberalism and the Spirit of Empire* (Princeton, NJ: Princeton University Press). An excellent contemporary account of liberal thought in the inter-war period that also touches on the return to empire by some contemporary intellectuals who should know better.

Sluga, G. (2013), *Internationalism in the Age of Nationalism* (Philadelphia, PA: University of Pennsylvania Press). Offers an intellectual history of internationalism as it was forged through 'five ages' in the twentieth century.

Sørensen, G. (2011), *A Liberal World Order in Crisis: Choosing Between Imposition and Restraint* (Ithaca, NY: Cornell University Press). A good account of the division within liberalism between advocates of 'imposition' and advocates of 'restraint'.

Visit the online resources to access the latest updates in the field of International Relations.

Chapter 8

Marxist theories of international relations

STEPHEN HOBDEN · RICHARD WYN JONES

Framing Questions

- Is the analysis of 'class' just as important as the analysis of 'state' for our understanding of global politics?

- Is globalization a new phenomenon or a long-standing feature of capitalist development?

- Is 'crisis' an inevitable feature of capitalism, and if so, does this mean that capitalism contains the seeds of its own destruction?

Reader's Guide

This chapter introduces, outlines, and assesses the Marxist contribution to the study of international relations. It first identifies several core features common to Marxist approaches and then discusses how Marx's ideas were internationalized by Lenin and subsequently by writers in the world-system framework. It then examines how Frankfurt School critical theory, and Gramsci and his various followers, introduced an analysis of culture into Marxist analysis, and, more recently, how new (or orthodox) Marxists have sought a more profound re-engagement with Marx's original writings. The chapter argues that no analysis of globalization is complete without an input from Marxist theory. Indeed, Marx was arguably the first theorist of globalization, and from the perspective of Marxism, the features often pointed to as evidence of globalization are hardly novel, but are rather the modern manifestations of long-term tendencies in the development of capitalism.

Visit the online resources to access an interactive timeline of how the discipline of International Relations has evolved.

8.1 Introduction

When the **cold war** ended in the late 1980s with the defeat of communism and the victory of global 'free market **capitalism**', it became commonplace to assume that the ideas of Karl Marx and his numerous disciples could be safely consigned to the dustbin of history. The future, it seemed clear, was capitalist and liberal democratic. Ironically enough, the fate of those communist parties that managed to retain **power** in China, Vietnam, and Cuba seemed only to underline the extent to which 'the Western model' had triumphed. In the wake of the failed attempt to build an alternative to the global capitalist system, they had all been forced to adapt themselves to its **hegemony**. For many it appeared only a matter of time before this was accompanied by the wider liberalization and democratization of those societies. Resistance would ultimately prove to be futile.

That was then. In the early 2020s, things appear very different. Even if its mortal enemy was defeated, the problems of capitalism have persisted and even intensified. Not only have the regular crises that characterize capitalism continued to wreak havoc, but the ever-deepening crisis that is humanity's relationship with the natural world raises fundamental questions about the sustainability of our current patterns of production and consumption. Massive global corporations may continue to be remorselessly successful in their efforts to persuade the already sated to buy more of what they do not really need, but the resulting environmental degradation is becoming increasingly hard to ignore. All the while, of course, even the most basic needs of many hundreds of millions of our fellow humans remain unfulfilled (see Ch. 27).

Not only that, but the ultimate triumph of liberal democracy can no longer be taken for granted. China, for example, appears to have arrived at a new, extremely dynamic social model that combines authoritarian political control with state-directed capitalism (see Case Study 8.1). To what extent will it be this model, rather than the 'Western model', that invites emulation among the countries of the Global South over the coming decades, especially as some

Case Study 8.1 The capitalist development of Communist China

Rapid urbanization in China
© Bloomberg / Getty Images

Marx and those who have developed his work since his death are famous for their critique of capitalism. It is easy to forget that Marx also acknowledged its transformative power, albeit as a necessary stage towards the development of a classless society. Indeed, it is hard to think of any writer before or since who has been more fulsome in his admiration of capitalism's 'constant revolutionizing of production', to quote the words of The Communist Manifesto: it has 'accomplished wonders' (Marx and Engels 1967). It nonetheless remains a considerable irony that there is no better example of the transformative power of capitalism than the People's Republic of China under the rule of the Chinese Communist Party (CCP).

When in 1949 the CCP finally emerged victorious from the civil war against the Nationalists, they inherited a country that had undergone a 'century of humiliation' at the hands of European imperialist powers, as well as invasion and brutal occupation by Japan prior to and during the Second World War. Subsequent economic and social development remained limited, not least due to the disastrous impacts of the 'Great Leap Forward' and 'Cultural Revolution'.

Since 1979, however, China has undergone an economic and related social transformation that has few if any parallels in human history. Starting from a comparatively low base, China is now by some measures the largest economy in the world, accounting for approximately one-fifth of the world's gross domestic product, as well as the world's largest producer of exports (nearly twice those of either the United States or Germany). Most accounts of this transformation cite the central importance of the economic reforms introduced by Deng Xiaoping when he became the effective leader of China in late 1978. While these reforms were ultimately very extensive, they were introduced gradually. Deng spoke of 'crossing the river by feeling for stones', indicating the need for careful experimentation and the imperative of maintaining stability. The eventual

result was a reversal of the collectivist policies of Mao Zedong, widespread marketization, and an opening up to the global economy—the latter boosted by China's membership in the World Trade Organization from 2001.

The embrace of capitalism—or in Deng's words, 'socialism with Chinese characteristics'—led to major changes in China's society and economy. According to the World Bank, more than 800 million people have been lifted out of poverty because of China's growth. This has been accompanied by rapid urbanization. According to International Labour Organization figures, more than 225 million people moved from the rural west of the country to the industrialized east, representing the largest population movement in history. It is a development that has 'rescued a considerable part of the population from the idiocy of rural life', to cite the words of Marx and Engels. China has also emerged as a

technological innovator, with its own space programme and the potential to develop sophisticated weaponry.

Potentially more puzzling for Marxists is that despite the emergence of a middle class and a wealthy bourgeoisie, developments in the superstructure have lagged behind economic changes. Indeed, rather than China adapting to the Western model of 'bourgeois democracy', a Chinese social model combining authoritarian political control with economic dynamism may yet emerge as a serious alternative to it.

Question 1: Assess the implications of China's economic transformation for the Marxist analysis of international relations.

Question 2: What are the implications of China's rapid economic transformation for its role in global politics?

Another striking feature of the global response to the pandemic has been the unwillingness of the countries of the privileged North to provide meaningful support to the Global South. The various pledges of financial support that have been made remain largely unfulfilled. Even more strikingly, almost nothing has been done to reduce extreme inequalities in terms of access to vaccines. Thus, while a high proportion of the population of developed countries have now received multiple doses, vaccination rates in the developing world are dramatically lower.

Part of the explanation for this is that governments in the Global North continue to support pharmaceutical companies in their refusal to waive patents on vaccines, even where companies received government money to develop those vaccines in the first place (**see Case Study 25.2**). Setting aside the immorality of

this position, given that in a globalized world even the most privileged will never be able to insulate themselves from the threat of the pandemic until the poorest are protected, this situation highlights another feature of capitalism emphasized by Marxists—its irrationality.

Question 1: Evaluate the ways in which the Covid-19 pandemic has revealed inequalities at a national and global level.

Question 2: What can we learn about the operation of capitalism from a study of vaccine availability in different countries?

Watch the video on the online resources to see the authors discuss these questions.

countries in the Global North themselves appear to be succumbing to more politically and socially authoritarian tendencies? While it may be too soon to measure the impacts of the global Covid-19 pandemic, it is also hard to imagine that the way it has served to exacerbate pre-existing inequalities will not have long-term repercussions for a global system that has inequality at its core (**see Case Study 8.2**).

Against this background, Marx is back as an intellectual force to be reckoned with. This is not only

because there are some uncanny parallels between his own times and our own—both periods of huge technological, socio-economic, and political turmoil and transformation (for Marx's life and times, see Liedman 2018). More fundamentally, Marx's forensic examination of both the extraordinary dynamism and inherent contradictions of capitalism has arguably never been improved upon. Its great strength is that it allows us to see how so many apparently different crises and instances of resistance, from the global to the most

personal and local, link together. Thus, even if Marx and Marxism failed to supply a prescription that would guarantee progressive social change, as a diagnosis of what ails us they remain essential tools for those who continue to strive for that goal.

Compared to **liberalism** and **realism** (**see Chs 7 and 9**), Marxist thought presents a rather unfamiliar view of international relations. While the former portray world politics in ways that resonate with those presented in the foreign news pages, Marxist theories aim to expose a deeper, underlying—indeed hidden—truth. This is that the familiar events of world politics—wars, treaties, international aid operations—all occur within structures that have an enormous influence on those events. These are the structures of a global capitalist system. Any attempt to understand world politics must be based on a broader understanding of the processes operating in global capitalism.

Marxist theories are also discomfiting, for they argue that the effects of global capitalism are to ensure that the powerful and wealthy prosper at the expense

of the powerless and the poor. We are all aware that there is gross inequality in the world. Statistics concerning the human costs of **poverty** are numbing in their awfulness (global poverty is further discussed in **Ch. 27**). Marxist theorists argue that the relative prosperity of the few is dependent on the destitution of the many. In Marx's own words, 'Accumulation of wealth at one pole is, therefore, at the same time accumulation of misery, agony of toil, slavery, ignorance, brutality at the opposite pole.'

Section 8.2 outlines some of the central features of the Marxist approach. Following from this, subsequent sections will explore some of the most important strands in contemporary Marx-inspired thinking about world politics. Given, however, the richness and variety of Marxist thinking about world politics, the account that follows is inevitably destined to be partial and to some extent arbitrary. Our aim is to provide a route map that we hope will encourage readers to explore further the work of Marx and of those who have built on the foundations he laid.

Case Study 8.2 The global Covid-19 pandemic

Frontline medical workers during the Covid-19 pandemic
© ADDICTIVE STOCK CREATIVES / Alamy Stock Photo

Daniel Defoe's account of the great plague that ravaged London in 1665 noted that 'the plague was chiefly among the poor'. Three hundred and fifty years later, even if the geographic impact of the Covid-19 pandemic is far wider—with **globalization** enabling very rapid worldwide transmission—in terms of its social impact, the pattern observed by Defoe remains largely unchanged. Whether comparing within or between different

countries, it is the poorest who have tended to suffer most, with Covid-19 exacerbating pre-existing inequalities based on nation, class, race, and gender. In this way, the pandemic has served to confirm one of the most basic insights of the Marxist approach to international relations: our life chances are shaped to a very significant extent by our location within the global capitalist system.

Even if Northern societies differ considerably in terms of social welfare provision, a general pattern is nonetheless observable. During the pandemic, workers in the more protected and privileged parts of the economy, including academics such as ourselves, tended to be able to work from the relative safety of their own homes. Furthermore, those working on secure contracts often found themselves 'furloughed'—that is, their was income supported either directly or indirectly by the government. By contrast, relatively low-paid 'frontline' or 'key' workers such as nurses, bus drivers, and delivery workers were required to daily put themselves at risk through close interaction with other members of the public. Furthermore, many of those on insecure contracts fell beyond the purview of furlough schemes and had to keep working to maintain an income. In other words, those who were already the lowest paid and most insecurely employed found themselves being put at most risk during the pandemic, whether to keep society functioning or to avoid destitution.

8.2 The essential elements of Marxist theories of world politics

In his inaugural address to the Working Men's International Association in London in 1864, Karl Marx told his audience that history had 'taught the working classes the duty to master [for] themselves the mysteries of international politics'. However, despite the fact that Marx himself wrote copiously about international affairs (see K. Anderson 2010), most of this writing was journalistic in character.

He did not incorporate the international dimension into his theoretical mapping of the contours of capitalism. This 'omission' should perhaps not surprise us. The staggering ambition of the theoretical enterprise in which he was engaged, as well as the nature of his own methodology, inevitably meant that Marx's work would be contingent and unfinished.

Marx was an enormously prolific writer, and his ideas developed and changed over time. Hence it is not surprising that his legacy has been open to numerous interpretations. In addition, real-world developments have also led to the revision of his ideas in the light of experience. Various schools of thought have emerged that claim Marx as a direct inspiration, or whose work can be linked to Marx's legacy. Before discussing what is distinctive about these approaches, it is important to examine the essential common elements that connect them.

First, all the theorists discussed in this chapter share with Marx the view that the social world should be analysed as a totality. The academic division of the social world into different areas of enquiry—history, philosophy, economics, political science, sociology, international relations, etc.—is both arbitrary and unhelpful. None can be understood without knowledge of the others: the social world has to be studied as a whole. Given the scale and complexity of the social world, this exhortation clearly makes great demands of the analyst. Nonetheless, for Marxist theorists, the disciplinary boundaries that characterize the contemporary social sciences need to be transcended if we are to generate a proper understanding of the dynamics of world politics.

Another key element of Marxist thought is the materialist conception of history (or 'historical materialism'). The central contention here is that processes of historical change are ultimately a reflection of the economic development of society. That is, economic development is effectively the motor of history. The central dynamic that Marx identifies is tension between the **means of production** and **relations of production** that together form the economic base of a given society. As the means of production develop, for example through technological advancement, previous relations of production become outmoded, and indeed become fetters restricting the most effective utilization of the new productive capacity. This in turn leads to a process of social change whereby relations of production are transformed in order to better accommodate the new configuration of means. Developments in the economic base act as a catalyst for the broader transformation of society as a whole. This is because, as Marx argues in the Preface to his *Contribution to the Critique of Political Economy*, 'the mode of production of material life conditions

the social, political and intellectual life process in general' (Marx 1970 [1859]: 20–1). Thus the legal, political, and cultural **institutions** and practices of a given society reflect and reinforce—in a more or less mediated form—the pattern of power and control in the economy. It follows logically, therefore, that change in the economic base ultimately leads to change in the 'legal and political superstructure'. (For a diagrammatical representation of the base–superstructure model, **see Fig. 8.1**.) The relationship between the base and superstructure is one of the key areas of discussion in Marxism, and for critics of Marxist approaches.

Class plays a key role in Marxist analysis. In contrast to liberals, who believe that there is an essential harmony of interest between various social groups, Marxists hold that society is systematically prone to class conflict. Indeed, in the *Communist Manifesto*, which Marx co-authored with Engels, it is argued that 'the history of all hitherto existing societies is the history of class struggle' (Marx and Engels 1967 [1848]). In capitalist society, the main axis of conflict is between the bourgeoisie (the capitalists) and the proletariat (the workers).

Despite his commitment to rigorous scholarship, Marx did not think it either possible or desirable for the analyst to remain a detached or neutral observer of this great clash between capital and labour. He argued that 'philosophers have only interpreted the world in various ways; the point, however, is to change it'. Marx was committed to the cause of **emancipation**. He was not interested in developing an understanding of the dynamics of capitalist society simply for the sake of it. Rather, he expected such an understanding to make it easier to overthrow the prevailing order and replace it with a communist society—a society in which wage labour and private property are abolished and social relations transformed.

It is important to emphasize that the essential elements of Marxist thought, all too briefly discussed in this section, are also fundamentally contested. That is,
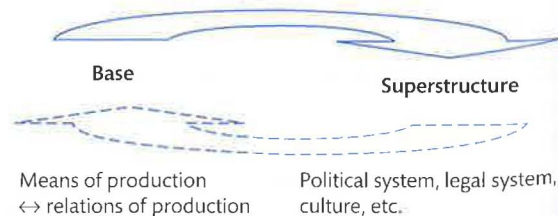

Base   **Superstructure**

Means of production   Political system, legal system,
↔ relations of production   culture, etc.

Figure 8.1 The base–superstructure model

they are subject to much discussion and disagreement even among contemporary writers who have been influenced by Marxist writings. There is disagreement as to how these ideas and concepts should be interpreted and how they should be put into operation. Analysts also differ over which elements of Marxist thought are most relevant, which have been proven to be mistaken, and which should now be considered as outmoded or in need of radical overhaul. Moreover, they diverge substantially in terms of their attitudes to the legacy of Marx's ideas. The work of the new Marxists, for example, draws more directly on Marx's original ideas than does the work of the critical theorists.

<div style="border:1px solid; padding:8px;">

Key Points

- Marx himself provided little in terms of a theoretical analysis of international relations.

- Marx's ideas have been interpreted and appropriated in a number of different and contradictory ways, resulting in a number of competing schools of Marxism.

- Underlying these different schools are several common elements that can be traced back to Marx's writings: a commitment to analysis of the social world as a totality, a materialist conception of history, and a focus on class and class struggle.

- For Marx and Marxists, scholarship is not a disinterested activity: the ultimate aim is to assist in a process of human emancipation.

</div>

8.3 Marx internationalized: from imperialism to world-systems theory

Although Marx was clearly aware of the international and expansive character of capitalism, his key work, *Capital*, focuses on the development and characteristics of nineteenth-century British capitalism. At the start of the twentieth century a number of writers took on the task of developing analyses that incorporated the implications of capitalism's transborder characteristics, in particular **imperialism** (see Brewer 1990). Rosa Luxemburg was a major contributor to these debates. Her 1913 book, *The Accumulation of Capital* (Luxemburg 2003 [1913]), argued that by analysing capitalism as a closed system, Marx had overlooked the central role played by the colonies. In order to survive, Luxemburg argued, capitalism constantly needed to expand into non-capitalist areas. A 1917 pamphlet by Lenin, *Imperialism, the Highest Stage of Capitalism*, made similar arguments. Lenin accepted much of Marx's basic thesis, but argued that the character of capitalism had changed since Marx published the first volume of *Capital* in 1867 (Marx 1992 [1867]). Capitalism had entered a new stage—its highest and final stage—with the development of monopoly capitalism. Under monopoly capitalism, a two-tier structure had developed in the world economy, with a dominant core exploiting a less-developed periphery. With the development of a core and periphery, there was no longer an automatic **harmony of interests** between all workers as posited by Marx. The bourgeoisie in the core countries could use profits derived from exploiting the periphery to improve the lot of their own proletariat. In other words, the capitalists of the core could pacify their

own working class through the further exploitation of the periphery.

Lenin's views were taken up by the Latin American Dependency School, adherents of which developed the notion of core and periphery in greater depth. In particular, Raúl Prebisch (1949) argued that countries in the periphery were suffering as a result of what he called 'the declining **terms of trade**'. He suggested that the price of manufactured goods increased more rapidly than that of raw materials. So, for example, year by year it requires more tons of coffee to pay for a refrigerator. As a result of their economies' reliance on raw material production, countries of the periphery become poorer relative to the core. Other writers such as André Gunder Frank (1967) and Fernando Henrique Cardoso (who was President of Brazil from 1995 to 2003) developed this analysis further to show how the development of less industrialized countries was directly 'dependent' on the more advanced capitalist societies. It is from the framework developed by such writers that contemporary world-systems theory emerged.

World-systems theory is particularly associated with the work of Immanuel Wallerstein (1930–2019). For Wallerstein, global history has been marked by the rise and demise of a series of world systems. The modern world system emerged in **Europe** at around the turn of the sixteenth century. It subsequently expanded to encompass the entire globe. The driving force behind this seemingly relentless process of expansion and incorporation has been capitalism, defined by Wallerstein (1979: 66) as 'a system of

production for sale in a market for profit and appropriation of this profit on the basis of individual or collective ownership'. In the context of this system, all the institutions of the social world are continually being created and recreated. Furthermore, and crucially, it is not only the elements within the system that change. The system itself is historically bounded. It had a beginning, has a middle, and will have an end.

In terms of the geography of the modern world system, in addition to a core–periphery distinction, Wallerstein added an intermediate semi-periphery, which displays certain features characteristic of the core and others characteristic of the periphery. Although dominated by core economic interests, the semi-periphery has its own relatively vibrant indigenously owned industrial base (**see Fig. 8.2**). Because of this hybrid nature, the semi-periphery plays important economic and political roles in the modern world system. In particular, it provides a source of labour that counteracts any upward pressure on wages in the core. It also offers a new home for those industries that can no longer function profitably in the core (e.g. car assembly and textiles). The semi-periphery plays a vital role in stabilizing the political structure of the world system.

According to world-systems theorists, the three zones of the world economy are linked together in an exploitative relationship in which wealth is drained

Figure 8.2 Interrelationships in the world economy

away from the periphery to the core. As a consequence, the relative positions of the zones become ever more deeply entrenched: the rich get richer while the poor become poorer.

Together, the core, semi-periphery, and periphery make up the geographic dimension of the world economy. However, described in isolation they provide a rather static portrayal of the world system. A key component of Wallerstein's analysis has been to describe how world systems have a distinctive life cycle: a beginning, a middle, and an end. In this sense, the capitalist world system is no different from any other system that has preceded it. Controversially, Wallerstein (1995) argues that the end of the cold war, rather than marking a triumph for liberalism, indicates that the current system has entered its 'end' phase—a period of crisis that will end only when it is replaced by another system. On Wallerstein's reading, such a period of crisis is also a time of opportunity. In a time of crisis, actors have far greater agency to determine the character of the replacement structure. In his final years, Wallerstein sought to promote a new world system that is more equitable and just than the current one (Wallerstein 1998, 1999, 2006; Wallerstein et al. 2013). From this perspective, to focus on **globalization** is to ignore what is truly novel about the contemporary era. Indeed, for Wallerstein, current globalization discourse represents a 'gigantic misreading of current reality' (Wallerstein 2003: 45). The phenomena evoked by 'globalization' are manifestations of a world system that emerged in **Europe** during the sixteenth century to incorporate the entire globe: a world system now in terminal decline.

Feminist Marxists have also played a significant role in theorizing the development of an international capitalist system. A particular concern of feminist writers (often drawing their inspiration from Engels's (2010 [1884]) work *The Origin of the Family, Private Property, and the State*) has been the role of women, both in the workplace and as the providers of domestic labour necessary for the reproduction of capitalism. For example, Maria Mies (1998 [1986]) argued that women play a central role in the maintenance of capitalist relations. There is, she argues, a **sexual** (or one could say **gendered**) **division of labour**: first, women in the developed world working as housewives, whose labour is unpaid but vital in maintaining and reproducing the labour force; and second, women in the developing world as a source of cheap labour. She
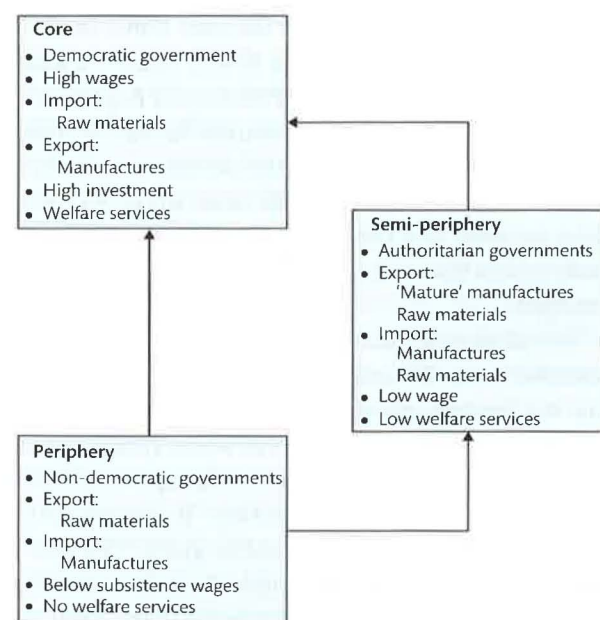
later argued that women were the 'last colony' (Mies, Bennholdt-Thomsen, and von Werlhof 1988), a view that can be traced back to Rosa Luxemburg's claim regarding the role of the colonies in international capitalism (Luxemburg 2003 [1913]).

In the wake of the attacks of **9/11**, and the subsequent response by the US administration of George W. Bush, questions of imperialism returned to the political and academic agenda. A number of authors called for the creation of a new empire with the United States at its centre, supposedly recreating the stabilizing and positive role that Britain had played in the nineteenth century (Ferguson 2003). A number of Marxist-influenced authors responded with critiques both of empire and of US foreign policy after 9/11 (for example, Harvey 2003).

8.4 Gramscianism

8.4.1 Antonio Gramsci—the importance of hegemony

This section examines the strand of Marxist theory that has emerged from the work of the Italian Marxist Antonio Gramsci. Gramsci's work has become particularly influential in the study of international political economy, where a neo-Gramscian or 'Italian' school continues to flourish. Here we shall discuss Gramsci's legacy and the work of Robert W. Cox, the contemporary theorist who did most to introduce his work to an International Relations audience.

Antonio Gramsci (1891–1937) was a Sardinian and one of the founding members of the Italian Communist Party. He was jailed in 1926 for his political activities and spent the remainder of his life in prison. Although many regard him as the most creative Marxist thinker of the twentieth century, he produced no single, integrated theoretical treatise. Rather, his intellectual legacy has been transmitted primarily through his remarkable *Prison Notebooks* (Gramsci 1971). The key question that animated Gramsci's theoretical work was: why had it proven to be so difficult to promote revolution in Western Europe? After all, Marx had predicted that revolution, and the **transition** to socialism, would occur first in the most advanced capitalist societies. But, in the event, it was the Bolsheviks of comparatively backward Russia that had made the first 'breakthrough', while all the subsequent efforts by putative revolutionaries in Western and Central Europe to

emulate their success ended in failure. The history of the early twentieth century seemed to suggest, therefore, that there was a flaw in classical Marxist analysis. But where had they gone wrong?

Gramsci's answer revolved around his use of the concept of hegemony, his understanding of which reflected his broader conceptualization of power. Gramsci developed Machiavelli's view of power as a centaur—half beast, half man—a mixture of coercion and consent. In understanding how the prevailing order was maintained, Marxists had concentrated almost exclusively on the coercive practices and **capabilities** of the state. On this understanding, it was simply coercion, or the fear of coercion, that kept the exploited and alienated majority in society from rising up and overthrowing the system that was the cause of their suffering. Gramsci recognized that while this characterization may have held true in less developed societies, such as pre-revolutionary Russia, it was not the case in the more developed countries of the West. Here the system was also maintained through consent.

Consent, on Gramsci's reading, is created and recreated by the hegemony of the ruling class in society. It is this hegemony that allows the moral, political, and cultural values of the dominant group to become widely dispersed throughout society and to be accepted by subordinate groups and classes as their own. This takes place through the institutions of **civil society**: the **network** of institutions and practices that enjoy some autonomy from the state, and through which groups

and individuals organize, represent, and express themselves to each other and to the state (for example, the media, the education system, churches, and voluntary organizations).

Several important implications flow from this analysis. The first is that Marxist theory needs to take superstructural phenomena seriously, because while the structure of society may ultimately be a reflection of social relations of production in the economic base, the nature of relations in the superstructure is of great relevance in determining how susceptible that society is to change and transformation. Gramsci used the term 'historic bloc' to describe the mutually reinforcing and reciprocal relationships between the socio-economic relations (base) and political and cultural practices (superstructure) that together underpin a given order. For Gramsci and Gramscians, to reduce analysis to the narrow consideration of economic relationships on the one hand, or solely to politics and ideas on the other, is deeply mistaken. It is their interaction that matters.

Gramsci's argument also has crucial implications for political practice. If the hegemony of the ruling class is a key element in the perpetuation of its dominance, then society can only be transformed if that hegemonic position is successfully challenged. This entails a counter-hegemonic struggle in civil society, in which the prevailing hegemony is undermined, allowing an alternative historic bloc to be constructed.

Gramsci's writing reflects a particular time and a particular—in many ways unique—set of circumstances. This has led several writers to question the broader applicability of his ideas (see Burnham 1991; Germain and Kenny 1998). But the most important test, of course, is how useful ideas and concepts derived from Gramsci's work prove to be when they are removed from their original context and applied to other issues and problems. It is to this question that we now turn.

8.4.2 Robert W. Cox—the analysis of 'world order'

It was the Canadian scholar Robert W. Cox (1926–2018) who arguably did most to introduce Gramsci to the study of world politics. He developed a Gramscian approach that involves both a critique of prevailing theories of international relations and international political economy, and the development

of an alternative framework for the analysis of world politics.

To explain Cox's ideas, we begin by focusing on one particular sentence in his seminal 1981 article, 'Social Forces, States, and World Orders: Beyond International Relations Theory'. The sentence, which has become one of the most often-quoted lines in all of contemporary International Relations theory, reads: 'Theory is always for some one, and for some purpose' (R. Cox 1981: 128). It expresses a world-view that follows logically from the Gramscian, and broader Marxist, position that has been explored in this chapter. If ideas and values are (ultimately) a reflection of a particular set of social relations, and are transformed as those relations are themselves transformed, then this suggests that all knowledge (of the social world at least) must reflect a certain context, a certain time, a certain space. Knowledge, in other words, cannot be objective and timeless in the sense that some contemporary realists, for example, would like to claim.

One key implication of this is that there can be no simple separation between facts and values. Whether consciously or not, all theorists inevitably bring their values to bear on their analysis. This leads Cox to suggest that we need to look closely at each of those theories, those ideas, those analyses that claim to be objective or value-free, and ask who or what is it for, and what purpose does it serve? He subjected realism, and in particular its contemporary variant **neorealism**, to thoroughgoing critique on these grounds. According to Cox, these theories are for—or serve the interests of—those who prosper under the prevailing order: the inhabitants of the developed states, and in particular the ruling elites. The purpose of these theories, whether consciously or not, is to reinforce and legitimate the status quo. They do this by making the current configuration of international relations appear natural and immutable. When realists (falsely) claim to be describing the world as it is, as it has been, and as it always will be, what they are in fact doing is reinforcing the ruling hegemony in the current world order.

Cox contrasted problem-solving theory (that is, theory that accepts the parameters of the present order, and thus helps legitimate an unjust and deeply iniquitous system) with **critical theory**. Critical theory attempts to challenge the prevailing order by seeking out, analysing, and, where possible, assisting social processes that can potentially lead to emancipatory change.

One way in which theory can contribute to these emancipatory goals is by developing a theoretical understanding of world orders that grasps both the sources of stability in a given system, and also the dynamics of processes of transformation. In this context, Cox drew on Gramsci's notion of hegemony and transposed it to the international realm, arguing that hegemony is as important for maintaining stability and continuity there as it is at the domestic level. According to Cox, successive dominant powers in the international system have shaped a world order that suits their interests, and have done so not only as a result of their coercive capabilities, but also because they have managed to generate broad consent for that order, even among those who are disadvantaged by it.

For the two hegemons that Cox analyses (the UK and the US), the ruling hegemonic idea has been 'free trade'. The claim that this system benefits everybody has been so widely accepted that it has attained 'common sense' status. Yet the reality is that while 'free trade' is very much in the interests of the hegemon (which, as the most efficient producer in the global economy, can produce goods which are competitive in all markets, so long as it has access to them), its benefits for peripheral states and regions are far less apparent. Indeed, many would argue that 'free trade' is a hindrance to their economic and social development. The degree to which a state can successfully produce and reproduce its hegemony is an indication of the extent of its power. The success of the United States in gaining worldwide acceptance for neoliberalism

8.5 Critical theory

Both Gramscianism and critical theory have their roots in Western Europe in the 1920s and 1930s—a place and a time in which Marxism was forced to come to terms not only with the failure of a series of attempted revolutionary uprisings, but also with the rise of fascism. However, contemporary critical theory and Gramscian thought about international relations draw on the ideas of different thinkers, with differing intellectual concerns. There is a clear difference in focus between these two strands of Marxist thought, with those influenced by Gramsci tending to be much more concerned with issues relating to the subfield of international political economy than critical theorists. Critical theorists, on the other hand, have involved themselves with

suggests just how dominant the current hegemon has become.

But despite the dominance of the present world order, Cox did not expect it to remain unchallenged. Rather, he maintained Marx's view that capitalism is an inherently unstable system, riven by inescapable contradictions. Inevitable economic crises will act as a catalyst for the emergence of counter-hegemonic movements. The success of such movements is, however, far from assured. In this sense, thinkers such as Cox face the future on the basis of a dictum popularized by Gramsci—that is, combining 'pessimism of the intellect' with 'optimism of the will'.

questions concerning **international society**, international ethics, and **security** (the latter through the development of critical security studies). This section introduces critical theory and the thought of one of its main proponents in the field of International Relations, Andrew Linklater.

Critical theory developed out of the work of the **Frankfurt School**. This was an extraordinarily talented group of thinkers who began to work together in the 1920s and 1930s. As left-wing German Jews, the members of the school were forced into exile by the Nazis' rise to power in the early 1930s, and much of their most creative work was produced in the US. The leading lights of the first generation of the Frankfurt

School included Max Horkheimer, Theodor Adorno, and Herbert Marcuse. A subsequent generation has taken up the legacy of these thinkers and developed it in important and innovative ways. The best known is Jürgen Habermas, who is regarded by many as the most influential of all contemporary social theorists. Given the vast scope of critical theory writing, this section can do no more than introduce some of its key features.

The first point to note is that their intellectual concerns are rather different from those of most other Marxists: they have not been much interested in the further development of analysis of the economic base of society. They have instead concentrated on questions relating to culture, bureaucracy, the social basis and nature of authoritarianism, and the structure of the family, and on exploring such concepts as reason and **rationality** as well as theories of knowledge. Frankfurt School theorists have been particularly innovative in terms of their analysis of the role of the media, and what they have famously termed the 'culture industry'. In other words, in classical Marxist terms, the focus of critical theory is almost entirely superstructural.

Another key feature is that critical theorists have been highly dubious as to whether the proletariat in contemporary society does in fact embody the potential for emancipatory transformation in the way that Marx believed. Rather, with the rise of mass culture and the increasing commodification of every element of social life, Frankfurt School thinkers have argued that the working class has simply been absorbed by the system and no longer represents a threat to it. This, to use Marcuse's famous phrase, is a one-dimensional society, to which the vast majority simply cannot begin to conceive an alternative.

Finally, critical theorists have made some of their most important contributions through their explorations of the meaning of emancipation. Emancipation, as we have seen, is a key concern of Marxist thinkers, but the meaning that they give to the term is often very unclear and deeply ambiguous. Moreover, the historical record is unfortunately replete with examples of unspeakably barbaric behaviour being justified in the name of emancipation, of which imperialism and Stalinism are but two. Traditionally, Marxists have equated emancipation with the process of humanity gaining ever greater mastery over nature through the development of ever more sophisticated technology, and its use for the benefit of all. But early critical theorists argued that humanity's increased domination over nature had been bought at too high a price,

claiming that the kind of mindset that is required for conquering nature slips all too easily into the domination of other human beings. In contrast, they argued that emancipation had to be conceived of in terms of a reconciliation with nature—an evocative, if admittedly vague, vision. By contrast, Habermas's understanding of emancipation is more concerned with communication than with our relationship with the natural world. Setting aside the various twists and turns of his argument, Habermas's central political point is that the route to emancipation lies through radical democracy—a system in which the widest possible participation is encouraged not only in word (as is the case in many Western democracies) but also in deed, by actively identifying barriers to participation—be they social, economic, or cultural—and overcoming them. For Habermas and his many followers, participation is not to be confined within the borders of a particular sovereign state. Rights and obligations extend beyond state frontiers. This, of course, leads Habermas directly to the concerns of International Relations, and it is striking that his recent writings have begun to focus on the international realm. In particular, he has become an impassioned defender of European integration. However, thus far, the most systematic attempt to think through some of the key issues in world politics from a recognizably Habermasian perspective has been made by Andrew Linklater.

Linklater has used some of the key principles and precepts developed in Habermas's work to argue that emancipation in the realm of international relations should be understood in terms of the expansion of the moral boundaries of a **political community** (see **Ch. 12**). In other words, he equates emancipation with a process in which the borders of the sovereign state lose their ethical and moral significance. At present, state borders denote the furthest extent of our sense of duty and obligation, or at best, the point where our sense of duty and obligation is radically transformed, only proceeding in a very attenuated form. For critical theorists, this situation is simply indefensible. Their goal is therefore to move towards a situation in which citizens share the same duties and obligations towards non-citizens as they do towards their fellow citizens.

To arrive at such a situation would, of course, entail a wholesale transformation of the present institutions of governance. But an important element of the critical theory method is to identify—and, if

possible, nurture—tendencies that exist in the present conjuncture that point in the direction of emancipation. On this basis, Linklater (here very much echoing Habermas) identifies the development of the European Union as representing a progressive or emancipatory tendency in contemporary world politics. If true, this suggests that an important part of the international system is entering an era in which the sovereign state, which has for so long claimed an exclusive hold on its citizens, is beginning to lose some of its pre-eminence. Given the notorious pessimism of the thinkers of the Frankfurt School, the guarded optimism of Linklater in this context is indeed striking. Indeed, the increasingly obvious authoritarian tendencies pointed to in **Section 8.1** may suggest a case for returning to the work of that first generation of critical theorists for ideas and inspiration.

8.6 New Marxism

8.6.1 'New Marxists'

This section examines the work of writers who derive their ideas more directly from Marx's own writings. To indicate that they represent something of a departure from other Marxist and post-Marxist trends, we have termed them 'new Marxists'. They themselves might well prefer to be described as 'historical materialists' (one of the key academic journals associated with this approach is called *Historical Materialism*); however, as that is a self-description which has also been adopted by some Gramsci-inspired writers, the appellation may not be particularly helpful for our present purposes. At any rate, even if there remains no settled label for this group of scholars, the fundamental approach that they embody is not hard to characterize. They are Marxists who have returned to the fundamental tenets of Marxist thought and sought to reappropriate ideas that they regard as having been neglected or somehow misinterpreted by subsequent generations. On this basis, they have sought both to criticize other developments in Marxism, and to make their own original theoretical contributions to the understanding of contemporary trends.

The most outstanding advocate of what one might term 'the return to Marx' is the geographer David Harvey, whose explorations and explanations of Marx's masterpiece *Capital* have reached an enormous online audience as well as being published in book form (see

> **Key Points**
>
> - Critical theory has its roots in the work of the Frankfurt School.
> - Critical theorists have tended to focus their attention on culture (especially the role of the media), bureaucracy, the social basis and nature of authoritarianism, and the structure of the family, and on exploring such concepts as reason and rationality.
> - Jürgen Habermas is the most influential contemporary advocate of critical theory; he advocates radical democracy as a means of unlocking the emancipatory potential inherent in the realm of communication.
> - Andrew Linklater has developed critical theory themes to argue in favour of the expansion of the moral boundaries of the political community, and has pointed to the European Union as an example of a post-Westphalian institution of governance.

davidharvey.org; Harvey 2018). In another important contribution, Kevin B. Anderson's *Marx at the Margins* (2010) focuses on Marx's little-known writing on the world politics of his day to recover his ideas about nationalism, ethnicity, and race.

8.6.2 Uneven and combined development

Meanwhile, in a series of articles, Justin Rosenberg (1996, 2013; also see Callinicos and Rosenberg 2008) has developed an analysis based on Leon Trotsky's idea of uneven and combined development, which Trotsky outlined primarily in his history of the Russian Revolution. Contrary to the traditional Marxist line, Trotsky observed that capitalism was not having the effects that were anticipated. Certainly it was spreading around the globe at a rapid rate as Marx and Engels had predicted in the *Communist Manifesto*. However, Marx and Engels had predicted that capitalism would create a world 'after its own image'. Elsewhere Marx (1954 [1867]: 19) had stated that 'the country that is more developed industrially only shows, to the less developed, the image of its own future'. Marx at this point appeared to have a unilinear perspective on historical development and, while there is evidence in some of his later writing that he became sceptical about this view, it was not an issue that he had time to develop. Therefore it became Marxist orthodoxy that capitalist development was

a singular road, with countries joining the process at different times. There was just one route through capitalist modernization, the path having been mapped out by Britain as the pioneering capitalist economy. While some countries would start the journey at different times, the sequence and destination would be the same.

Trotsky's insight was that paths to development were indeed uneven in that different countries started the road to capitalism at different times, and from differing starting points. They were also, however, combined, in the sense that the development of capitalism in the states that had already started on the process had implications for those that followed. In other words, the context for capitalism in any one country would be set by all the other countries that had already embarked on capitalist development. Hence the process in Russia occurred in the context of capitalist developments elsewhere, and particularly in Western Europe. The advance of capitalism can thus be seen as an international process, with latecomers having certain disadvantages but also some advantages. One particular advantage was what Trotsky called the 'privilege of historic backwardness' (cited in Rosenberg 1996: 7). Countries joining the capitalist road had the possibility of leapfrogging states that had started earlier, because they had access to investment and technology that had not been previously available. However, this came at a potential cost: a distorted political structure. Whereas in Britain, the country on which Marx had focused his attention, the political system had evolved over a lengthy period of time and was relatively stable, in Russia the political structure that emerged from a rapid process of modernization was highly unstable. It was characterized by an authoritarian state leading the process of development in conjunction with international finance, a growing but concentrated working class, an enormous peasantry on which the state was reliant for raising tax, but only a small and weak bourgeoisie. Hence the social formation in Russia was markedly different from that of Britain, and its structure made sense only in the context of the *international* development of capital.

While Trotsky used the concept of uneven and combined development to analyse the events leading up to the Russian Revolution, Kamran Matin (2013) has employed it to consider the history of Iran.

Criticizing Eurocentric accounts of historical progress that focus on European states as the model for state development, Matin argues that while the study of International Relations is crucial to understanding Iran's history, it has to be considered in conjunction with an assessment of Iran's domestic history. Matin shows how Iran's history is a complex interaction between its domestic social and economic systems and the priorities of international politics and economics. The country's historical progress has been impacted by both the influence of events such as the Russian Revolution, and the economic and political incursions by European countries and subsequently the United States. This has resulted in a largely unstable combination, in which attempts at modernization, for example by the last Shah, have faced a system combining a modern industrial sector, largely dominated by the state in collaboration with foreign capital, and a small cosmopolitan middle class along with a large agricultural and merchant class with established institutions and close links to the religious establishment. During the economic downturn of the 1970s, and in conjunction with pressure from the US Carter administration, this combination became increasingly unstable until the revolutionary overthrow of 1979. Development in Iran, then, Matin argues, can be understood only as uneven, in that Iran commenced on the capitalist path at a later time and from a different starting point, yet combined in terms of the influence of already existing global capitalism.

Key Points

- New Marxism is characterized by a direct re-engagement with and reappropriation of the concepts and categories developed by Marx himself or other classic Marxist thinkers.

- One example of New Marxist scholarship is Justin Rosenberg's work on uneven and combined development, which draws on Trotsky's examination of the development of Russia in the global political economy.

- Uneven and combined development suggests that rather than all countries following a single path of economic and political development, each country's path will be affected by the international context.

- The uneven and combined development approach has been utilized to analyse Iran's economic and political development in the twentieth century.

the First World War in the competition among capitalist states for control over the colonies. Since the economic crisis of 2008, international tensions have been mounting, particularly between Russia and the United States. By contrast, the 'long peace' of the cold war was marked by a period of relative economic stability.

Capitalist interests determine states' foreign policy. For example, Paul Wolfowitz, who was Deputy Secretary of Defense in the George W. Bush administration, openly declared that the 2003 invasion of Iraq was about securing access to oil. There is a long history of large corporations influencing US policy towards Latin America. For instance, United Fruit played a key role in lobbying for the overthrow of the Arbenz administration in Guatemala in 1954.

Against

The balance of power determines the character of international politics. Periods of relative balance coincide with greater stability in the international system. The 'long peace' of the second half of the twentieth century occurred because there was a relative balance of power between the United States and the Soviet Union, particularly since 'mutual assured destruction' meant that neither side could 'win' a nuclear conflict. The current

instability in the international system derives from the relative decline of the United States.

The spread of democracy produces greater global stability. While we may not have reached 'the end of history' in Francis Fukuyama's term, the claim that democracies don't go to war with each other retains its validity, and democracy promotion is the best hope for a more peaceful and stable future. Europe, which is now a peaceful community of democracies, was historically the most war-torn region in the world. With the exception of the break-up of post-communist Yugoslavia, Europe has not experienced a major conflict since the end of the Second World War.

Reducing state behaviour to the expression of capitalist interests does not explain actions that appear at least partly motivated by genuine altruistic or other concerns. Behaviour such as contributions to United Nations peacekeeping operations, for example, or pressure-group-inspired debt forgiveness, cannot readily be explained in terms of the operation of crude economic interests. More controversially, it might even be argued that some behaviours—such as the United States' continuing and largely uncritical support for Israel—may well work against the state's long-term economic interests. Simplistic, reductionist readings of the influences on state behaviour are almost always inadequate.

1. Does the balance of power provide a better explanation for periods of stability than economic prosperity?

2. Can state actions be reduced purely to economic interests?

3. What is the connection between economic power and military capability?

Visit the online resources to discover pointers to help you tackle these questions.

Questions

1. How would you account for the continuing vitality of Marxist thought?
2. How useful is Wallerstein's notion of a semi-periphery?
3. Why has Wallerstein's world-systems theory been criticized for its alleged Eurocentrism? Do you agree with this critique?
4. In what ways is 'combined and uneven development' a useful lens through which to view the development of world politics?
5. In what ways does Gramsci's notion of hegemony differ from that used by realist International Relations writers?
6. How might it be argued that Marx and Engels were the original theorists of globalization?
7. What do you regard as the main contribution of Marxist theories to our understanding of world politics?
8. How useful is the notion of emancipation employed by critical theorists?
9. Do you agree with Cox's distinction between 'problem-solving theory' and 'critical theory'?
10. Assess Wallerstein's claim that the power of the United States is in decline.

Visit the online resources to test your understanding by trying the self-test questions.

Further Reading

Anderson, K. B. (2010), *Marx at the Margins: On Nationalism, Ethnicity and Non-Western Societies* (Chicago: University of Chicago Press). A brilliant reconstruction of Marx's own writing on world politics.

Brincat, S., **Lima, L.**, and **Nunes, J.** (eds) (2012), *Critical Theory in International Relations and Security Studies: Interviews and Reflections* (London: Routledge). Interviews with some of the key proponents of critical theory in the field, along with further reflections both supportive and more critical.

Cox, R. W. (1981), 'Social Forces, States and World Orders: Beyond International Relations Theory', *Millennium*, 10(2): 126–55. Cox's much-quoted essay continues to inspire.

Derluguian, G. M. (2005), *Bourdieu's Secret Admirer in the Caucasus: A World-System Biography* (Chicago: University of Chicago Press). This unconventional book is a dazzling display of the insights generated by the world-system approach.

Eagleton, T. (2018), *Why Marx was Right* (New Haven, CT: Yale University Press). A short, highly entertaining and deceptively erudite defence of the core tenets of Marx's worldview.

Lenin, V. I. (1917), *Imperialism: The Highest Stage of Capitalism* (multiple editions available). While of limited contemporary relevance, it is still worth reading this once-influential pamphlet.

Linklater, A. (2007), *Critical Theory and World Politics: Sovereignty, Citizenship and Humanity* (London: Routledge). An important book from one the most influential critical theorists working on international relations.

Marx, K., and **Engels, F.** (1848), *The Communist Manifesto* (multiple editions available). The best introduction to Marx's thinking. Essential reading even after 150 years.

Wallerstein, I., **Collins, R.**, **Mann, M.**, **Derluguian, G.**, and **Calhoun, C.** (2013), *Does Capitalism Have a Future?* (New York: Oxford University Press). A fascinating exploration of the problems of contemporary global capitalism by prominent world-system theorists and their (sympathetic) critics.

Visit the online resources to access the latest updates in the field of International Relations.

Chapter 9

Realism

OR ROSENBOIM

Framing Questions

- What is the role of power in realist international theory?
- How do realists explain international conflict?
- Can realism provide a universal explanation of world politics?

Reader's Guide

This chapter discusses realism as a family of approaches to the study and analysis of international relations. Historical studies show that the realist school of thought in International Relations (IR) emerged in the mid-twentieth century, but many scholars argue that the key tenets of realism—power struggle, statism, self-help, and pessimism about human nature—can be found in the works of earlier thinkers and constitute a profound wisdom about international affairs. For many IR scholars, the realist perspective provides persuasive guidelines for practice and a powerful explanation for events in international affairs. The chapter surveys key aspects of realist international theory. It first introduces the theory of realism (see Section 9.1)

and its fundamental concepts (**see Section 9.2**). **Section 9.3** then examines the history of this theoretical approach. **Section 9.4** focuses on geopolitics as a central part of realist thought in the twentieth century. While realist theories typically share a core of common fundamental ideas, there are multiple versions of realist thought. **Section 9.5** examines the main realist approaches in contemporary English-language scholarship, and provides insights on Russian and Chinese realism. **Section 9.6** concludes the chapter by examining the relevance of realism for understanding international politics today.

Visit the online resources to access an interactive timeline of how the discipline of International Relations has evolved.

9.1 Introduction

The tradition of political realism includes a range of theoretical positions that share key ideas but differ in the emphasis on, and interpretation of, these ideas. Typically, the realist tradition emphasizes the power-seeking behaviour of human beings and the constant uncertainty of foreign politics. For some scholars, this renders realism a timeless and universal theory, applicable in any time and place.

Scholars and practitioners have found in realism a rational theory of foreign policy which aims to explain the world as it is, and not as they wish it to be. Since the Second World War, 'realist' approaches have influenced both the practice of international relations and the academic study of world politics. Indeed, for many decades realism was considered the dominant approach to the study of international relations in Western Europe and the United States (Boucher 1998).

According to a widely shared narrative in the academic discipline of International Relations (IR), realism rose to prominence in the mid-twentieth century in reaction to the failure of international organizations to end major war between great powers. British and American scholars, such as E. H. Carr and Hans Morgenthau, dubbed those who believed that international cooperation could prevent global conflicts 'idealists' and 'utopians'. These self-proclaimed realists

offered an alternative view which placed **power** at the core of international politics (Molloy 2006). Realism relied on **national interests** rather than ideology, sought peace through strength, and accepted pluralism in the international domain. Realist theorists embraced **statism**, highlighting the role of **states** over other actors in international relations, such as international organizations, individuals, or corporations. On this early view of the history of IR, the debate between 'realism' and 'idealism' became a cornerstone of the academic study of international relations, and each theory represented an opposing 'paradigm', or an essential set of concepts that can be used to explain international politics.

Since the 1990s, revisionist historians have challenged the historical accuracy of this narrative, suggesting that the distinction between 'realism' and the opposing approaches is less clear-cut (Wilson 1998; Schmidt and Guilhot 2019). At the same time, the academic study of international relations has moved towards a 'post-paradigm' era, which means that scholars tend to rely less on all-encompassing theories such as 'realism', 'liberalism', 'constructivism', or 'Marxism'. Instead, they seek more nuanced and critical ways to analyse world politics. The contemporary importance of realism as an international theory remains, therefore, an open question.

9.2 Fundamental ideas

Realism is a family of approaches marked by recurrent concerns and conclusions about international relations. There are no theoretical elements that can be found in all realist theories, yet realists characteristically argue that human nature and the lack of international government impose constraints on international relations, resulting in a primary emphasis on power and self-interest.

Watch the video on the online resources to see the author consider 'What is Realism?'

9.2.1 Human nature

Realists typically describe human nature as essentially selfish. In his book of advice for political leaders, the renaissance political thinker Niccolò Machiavelli

argued that 'men are excessively self-interested' (2019 [1513]: 58). The realm of politics is, therefore, conditioned by the egoistic passions of human nature (**see Box 9.1**). While Machiavelli did not reject morality as such, or the duty to act morally, he argued that in international politics, where the political leader shoulders the responsibility for the state's security, a different conception of morality was needed. This type of morality is subordinated to the '**reason of state**': it is judged by its consequences for the state's survival, rather than by conventional ethical considerations or individual ethics (Knoll 2019).

Realists acknowledge competing conceptions of morality and conclude that human egoism and the lack of an international sovereign imply that the international realm is dominated by concerns of power and interest (Donnelly 2000: 10). They often object to

political acts being measured by conventional ethical standards, drawing a substantial body of criticism from liberal theorists (**see Ch. 7**). Yet many realists reject views of human nature as immoral or *exclusively* egoistic and recognize that the quest for power is not the only motivation for human action (Niebuhr 2011 [1944]; Spykman 2017 [1942]). On the basis of this premise, the rest of this section examines five of the recurrent concepts that feature in many, though not all, realist theories.

9.2.2 Statism

Realists consider the state as the main actor in international relations. The fundamental trait of states is **sovereignty**, which is often described as the legitimacy to use force both internally and externally. Sovereignty means that the state has supreme authority to make and enforce laws within its territorial space. Realist theory

---

Box 9.1 Realism and morality

Realists typically accept that international politics is based primarily on considerations of power, not on principles of justice. This assumption, however, does not mean that realists advocate in favour of immoral behaviour, or that they are impervious to moral arguments. Instead, realists often recognize the importance of conventional ethical considerations, but claim that they have no place in international politics (Kennan 1985; Hobbes 2017 (1651)). Some, including Machiavelli (**see Section 9.2.1**), suggest that in politics, a moral act is judged by its contribution to the state's survival, thus endorsing a consequentialist view of morality.

In his book *The History of the Peloponnesian War*, which is a core text in the realist tradition, Greek historian Thucydides considers the tension between politics and morality. In the 'Melian Dialogue', which relates the Athenian invasion of Melos in 416 BCE, Thucydides describes how the Athenian envoys invited the Melian people to choose between surrender or destruction, arguing that only the law of the strongest can prevail in foreign affairs, with no room for considerations of justice. Thucydides, however, suggests that the neat opposition between realism and morality is false. He shows that utopian thinking without concrete military capabilities led to the defeat of Melos, but also implies that Athens' misguided use of political power contributed to its later demise in Sicily.

In the twentieth century, realist thinkers such as Morgenthau and Raymond Aron (1905–83) argued that interests of power and survival motivate states in the international realm, but political actors remain subject to moral judgement (Aron 2003 (1962)). While principles of justice alone cannot direct foreign policy, they are still important for providing states with public support and legitimacy.

---

assumes that the sovereign state can guarantee domestic order by setting up a system of law and enforcement, but argues that there is no sovereign authority to establish such a system in the international domain. Thus, in the uncertain conditions that characterize the international system, the state's primary aim is to guarantee its **survival** and **security**.

For realists, the quest for survival in conditions of international **anarchy** and uncertainty raises the 'security dilemma', which argues that 'many of the means by which a state tries to increase its security decrease the security of others' (Jervis 1978: 169). As Robert Jervis and others (e.g. Herz 1950; Butterfield 1951) have argued, states cannot be certain about the ambitions and intentions of other states. When states resort to power accumulation for defensive aims, they may inadvertently appear as a threat to other states. Consequently, the other side might take countermeasures against these defensive measures, generating a spiral of **uncertainty** and hostility. These unintended dynamics can lead to a decrease in international security and, potentially, war (Tang 2009). The security dilemma provides a theory of war and peace based on the interaction between states, in which anarchy, uncertainty, and fear influence state behaviour and its outcomes.

9.2.3 Power

The struggle for power is, for many realists, one of the fundamental characteristics of the international system. Realists such as Morgenthau saw power as 'man's control over the minds and actions of other men' and argued that 'the struggle for power is universal in time and space' (Morgenthau 1955 [1948]: 26, 17). Consequently, international conflict is always possible: political leaders can mitigate—but not eliminate—the risk of war. Thus, states typically operate in conditions of uncertainty about the power of other states and about their intentions to use power offensively or defensively (Jervis 1978; Van Evera 1999: 1–10).

Power is a relational and relative concept. Power is exercised in interaction with other entities and measured in comparison with them. There are various ways in which realist theory proposes to assess and measure a state's power in the international system. Neorealists like Kenneth Waltz use the term 'capabilities' to provide a more accurate ranking of the strength of states according to 'size of population and territory, resource endowment, economic capability, military strength, political stability and competence' (Waltz 1979: 131).

On this view, military resources can be a token of a state's power even if they are not put to actual use, for example in the case of the deterrent effect of nuclear weapons (**see Ch. 30**). This approach raises other difficulties, including measuring and comparing 'capabilities' and 'resources', and proving their impact on a state's military success or international influence. For example, India's large population has not, so far, translated to dominant political **influence** on international politics.

9.2.4 Anarchy

Many realists claim that international affairs take place in a state of anarchy. This does not imply a state of chaos, but the absence of political authority above states in the international system. The condition of anarchy defines the interaction of states in world politics, each striving to accumulate power to guarantee its survival. Realists believe that under international anarchy, states compete for power, economic profit, security, and influence. In other words, anarchy means that interaction between states is a zero-sum game: one state's gain is another's loss. Moreover, international anarchy increases the chances of war, 'even in the absence of aggressivity or similar factors' (Herz 1976: 10). When each state is focused on its own national interests, cooperation under anarchy—let alone arriving at a common agreement about shared principles—is very difficult.

Neorealism sees the anarchic **structure** of the international system as the main constraint on state behaviour. The pressures of anarchy condition state behaviour more than the decisions of individual state leaders or domestic political factors (Waltz 1979). The principle of the **balance of power** (**see Box 9.2**) is therefore the main instrument for states to guarantee their survival and security in the anarchic international system. Yet, as Jervis (1978) has shown, international anarchy and uncertainty may lead security-seeking states into costly spirals of mistrust and rivalry.

9.2.5 Survival

While classical realists such as Morgenthau emphasized the primary role of the struggle for power in international affairs, neorealists (**see Section 9.5.1**) argue that the pre-eminent goal of states in the international sphere is survival. Thus, for Waltz (1979: 91), 'beyond the survival motive, the aims of states may be endlessly varied'. Neorealists are divided in their interpretation of the ways in which states seek to guarantee their security and

---

Box 9.2 The balance of power

The core proposition of most balance of power theories is that 'hegemonies do not form in multistate systems because perceived threats of hegemony over the system generate balancing behavior by other leading states in the system' (Levy 2004: 37). A state or group of states would seek to match its power against the power of its rival by building military and economic capabilities (internal balancing) and forming alliances (external balancing). This process would eventually generate a stable equilibrium in the international system, which could prevent conflicts.

The term 'balance of power' emerged in eighteenth-century Europe when political thinkers sought ways to foster peace and stability among the European states (Molloy 2013). Later, it described existing and desired relations between European states from the end of the Napoleonic Wars to the First World War, when the British Empire was denoted as the 'balancer', using its political and military power to reinforce one side or another in the European state system. After 1918, the balance of power was reconsidered. The Second World War ended with a bipolar equilibrium between the United States and the Soviet Union, while the period following the break-up of the Soviet Union in 1991 is usually described as unipolar or multipolar (Little 2007).

Classical realists (Morgenthau 1948) challenged the usefulness of the balance of power theory because, for them, it lacked a clear measure of power, wrongly assumed a tendency to balance over a tendency towards struggle, and ignored the role of common moral principles in fostering peace. Structural realists suggested that the international system has an inherent balancing tendency. Thus, for Waltz (1979: 127), when two international 'coalitions' are formed, secondary states freely choose to join the weaker party to avoid being threatened by the stronger one. Others, like John Mearsheimer (2001), acknowledged that aspiring powers may actively challenge the existing equilibrium to attain a hegemonic position.

With no single definition of the balance of power, some scholars have described it as a useful metaphor for thinking about the international structure. Yet others doubt the theory's usefulness and its universal applicability, suggesting that it should be integrated with other perspectives on hegemony and power (Wohlforth et al. 2007).

---

survival. According to one approach, 'defensive neorealism', states pursue power only to the degree that would guarantee their survival in a balanced international system of states or coalitions of equal power (**see Box 9.2**). A different approach, 'offensive neorealism', argues that states seek to maximize their power—beyond what is needed for survival—and seek superiority rather than equality in the anarchic international system. According to Mearsheimer (2001: 33), 'states quickly understand that the best way to ensure their survival is to be the most powerful state in the system'.

The emphasis on survival among 'defensive neo-realists' has been criticized by other realists for its 'status-quo bias'. These realists argue that states adopt revisionist goals that seek to transform the balance of power—rather than merely guarantee their own survival—through aggressive expansion (Schweller 1996). Although the quest for survival means that war is always possible, some realists seek ways to prevent it by claiming that states may achieve security through cooperation (Jervis 1978). Jervis's theoretical proposals generated offence–defence theory, which contends that when it is relatively easy for a state to attack, this makes war more probable, but when the defence has the advantage, this decreases the probability of war (Van Evera 1999). This theory provides an optimistic perspective on state survival and war prevention that has informed foreign policy analysis.

9.2.6 Self-help

The principle of state action in the international domain is **self-help**. Under international anarchy, without a central authority, each state is responsible for its own security and well-being. According to realists, international organizations such as the United Nations cannot provide a sufficient guarantee of states' security or even survival. Therefore, in a system characterized by uncertainty and self-interest, states can rely only on themselves; they must define their own political objectives, and they should increase their power capabilities or join an alliance to defend themselves against external threats (Waltz 1979: 107).

> ### Key Points
>
> - While realism is a diverse approach, six central concepts are shared by most realist thinkers: a pessimistic view of human nature, power, anarchy, statism, survival, and self-help.
> - Power is often defined in terms of resources, military capability, gross national product, and population, which realists believe translate into political influence.
> - Anarchy refers to the lack of a central political authority in the international sphere, which means that states must pursue their own interests to guarantee their survival.
> - Statism is the doctrine which argues that states are the main actors in international relations, at the expense of individuals and international organizations. Statism means that the sovereign state has supreme authority within its territorial space and operates in an anarchic international system.
> - The ultimate concern of the state is its own security and survival, although some realists (for example, Mearsheimer) argue that states act to maximize power beyond what is necessary for their survival.
> - Self-help refers to the belief that each state is responsible for its own security and survival, as other states cannot be trusted, and international organizations are too weak.

9.3 Realism in historical perspective

In the years following the Second World War, realism emerged as an approach to the study of international relations in the United States and Britain. Realism is in fact a product of the twentieth century, yet realists often claim that their ideas rely on an ancient tradition of thought and turn to historical thinkers—whose works have attained the status of 'classics'—for descriptive insights about the world as it is (positive realist theory) and prescriptions for how leaders should act (normative realist theory). Although not all scholars who are today considered as part of IR's realist canon would have defined their work as such, their ideas continue to influence contemporary thinking about world politics from a realist perspective (M. Williams 2004).

Recent scholarship has sought to diversify existing narratives on the historical development of realist IR theory, showing the relevance of this theoretical tradition to a range of geographical and cultural contexts beyond the West. This section provides an overview of key thinkers who have become part of the realist tradition of thought in International Relations and continue to influence scholars today (see Section 9.3.1), and includes a brief historical account of realism in the academic study of International Relations (see Section 9.3.2).

9.3.1 Realism 'before realism'

Ideas associated with the realist tradition have existed in political thought since before the foundation of International Relations as an academic discipline in the twentieth century. Figures such as the Indian political thinker Kautilya (fourth century BCE) (see Case Study 9.1), the Greek historian Thucydides (460–400 BCE), the Arab historian and sociologist Ibn Khaldun (1332–1406), the Florentine thinker Niccolò Machiavelli (1469–1527), and the English philosopher Thomas Hobbes (1588–1679) have all been associated with a positive or normative realist perspective on international affairs. These thinkers embraced a pessimistic view of human nature, arguing that war was the natural state of human existence, and prioritized self-interest and power as the defining elements in politics (see Box 9.1).

Realists have often depicted the international realm as anarchical and governed not by law but by the will of the strongest, generating a constant risk of war. Ibn Khaldun (2020: 223), a Muslim scholar of the early modern period, suggested that 'wars and different kinds of fighting have occurred in the world ever since God created it . . . It is something natural among human beings; no nation or generation is free from it.' Thus, he claimed that international conflict can be attributed to certain characteristics of human nature, which cannot be eliminated.

Ancient political thinkers reflected on the struggle for power as a central attribute of politics. For Kautilya, a combination of human propensity to conflict and a systemic competition for power made war the natural condition of politics (see Case Study 9.1). Similarly, Thucydides considered the thirst for power and the need to follow self-interest as the defining elements of individuals and states alike. He recounted the Peloponnesian War between Athens and Sparta as an example of the centrality of power politics to human

> ## Case Study 9.1 Kautilya's realist thought
>
> As key adviser to Indian king Chandragupta Maurya (c.317–293 BCE), Kautilya advanced a 'realist' vision of politics intended to teach the king how to govern the first united empire in the Indian subcontinent. As an influential political writer in the ancient world, Kautilya endorsed monarchic rule, but emphasized the importance of welfare provisions. His discussions of diplomacy and war offered a political analysis based on the notions of power, deceit, and harsh measures against opponents. He was recognized by Max Weber (2004 [1919]) as an early 'realist' thinker who anticipated Machiavelli's theory of modern politics.
>
> In his treatise, *Arthashastra* (c.300 BCE), which has been translated as the 'science of politics' (Olivelle 2013), Kautilya suggested that the timeless law of foreign policy was the quest to maximize power and self-interest. The book encouraged readers to take an active stance in politics, condemning those who rely on religion, fate, or superstition. While the king is expected to do what is right for his own people, morality and goodwill are irrelevant considerations in government. Thus, nations wage war or make peace according to their political, military, and economic self-interest, and should expect other states to do the same. Similar assumptions can be found in the works of Thucydides, who wrote on great power struggle a century before Kautilya, and in the works of the Chinese scholar Han Feizi, written about 50 years after *Arthashastra*.
>
> Kautilya is most famous for his so-called foreign policy theory in which one's immediate neighbour is considered as an enemy but any state on the other side of one's neighbour is regarded as an ally. He suggested that there are six possible forms of state policy: peace, war, neutrality, marching, alliance, and selective conflict strategy. These policies served the king to obtain the three goods of life: material gain, spiritual good, and pleasures. Yet since conflict was the defining feature of the international realm, a successful king must be able to overcome enemies to provide the goods of life to his people. For Kautilya, foreign relations consisted mainly of war and conquest, while diplomacy and alliances provided additional means to maximize power.
>
> The would-be conqueror shall apply the six methods of foreign policy [as appropriate] to the various constituent elements of his Circle of States with the aim of progressing from a state of decline to one of neither decline nor progress and from this state to one of progress. The king who understands the interdependence of the six methods of foreign policy, as explained in this treatise, will bind other rulers by the chains of his intellect and can play with them as he pleases. The Six Methods:
>
> 1. Making peace is entering into an agreement with specific conditions [i.e. concluding a treaty]. A king shall make peace when he finds himself in relative decline compared to his enemy.
> 2. Active hostilities is waging war. A king superior to his enemy in power shall attack him.
> 3. Being indifferent to a situation is staying quiet. When a king considers that neither he nor his enemy can harm the other, he shall remain quiet.
> 4. Augmenting one's own power is preparing for war. A king with special advantages shall make preparations for war.
> 5. Getting the protection of another is seeking support. A king depleted in power shall seek help.
> 6. Dual policy is making peace with one king and war with another. A king whose aim can be achieved [only] with the help of another shall pursue a dual policy.
>
> *(Kautilya 1992: p. 563)*
>
> **Question 1:** Is peace only attractive to the weak, according to Kautilya?
>
> **Question 2:** Does Kautilya believe that good state leaders can be moral?

behaviour and noted that the unequal distribution of power in the international realm further exacerbated warlike tendencies arising from human nature. Thucydides highlighted a now famous example from the Peloponnesian War, in which Athens' attempt to expand its empire made the Spartans less secure, leading to a war. Ambition, fear, and honour motivated their conflict which, Thucydides argued, ignored moral considerations with disastrous results (**see Box 9.1**).

The pursuit of glory and honour was an important motivation in international politics, according to Machiavelli, one of the first theorists of the modern state (**see Section 9.2.1**). A leader's glory and honour depended on their ability to govern well and advance the common good, and reflected the state's power (Machiavelli (2019 [1513]): 50–53, 69–70). Thus, Machiavelli acknowledged that leaders waged wars not only for the security of their state—which they were entrusted to defend—but also to aggrandize the state and their own personal glory.

According to Thomas Hobbes, human nature and the lack of supreme authority were the main causes of war, which was only contained by establishment of the state. In his political treatise, *Leviathan* (1651), he argued that 'during the time men live without a common Power to keep them all in awe, they are in that condition which is called Warre; and such a warre, as is of every man, against every man' (Hobbes 2017: 283). Thus, in the anarchic state of nature, the threat of war of all against all was ever-present. For Hobbes, people agree to limit their liberty and confer power to the state in exchange for security that permits them to pursue 'higher' human aspirations. Yet no similar authority is available in the international sphere, where states must perpetually struggle for power and security under conditions of anarchy.

9.3.2 Realism in the twentieth century

The First World War gave an important impetus to the early academic discipline of International Relations, leading greater numbers of scholars to the study of world politics, initially in the attempt to explain interstate conflicts and promote peace between the main imperial powers. As more universities engaged in teaching and studying international affairs, scholars sought to provide the new scholarly field with a solid theoretical grounding. International Relations scholars like E. H. Carr (1892–1982), Hans J. Morgenthau (1904–80), and John Herz (1908–2005) developed theories of

international affairs which they defined as 'realist', emphasizing the importance of the state, power struggle, and a pessimistic understanding of human nature. Through a process of writing history backwards, they claimed a lineage with the historical figures discussed in **Section 9.3.1**. In their teaching and publications, realist scholars Morgenthau and Kenneth Thompson (1950) sought to enhance realism's authority, and to establish a separate discipline of IR, by depicting it as a theoretical approach that was universal. Their survey of almost entirely white, European, and male 'canonical thinkers' claimed that IR theory's intellectual roots lay in Ancient Greece and Renaissance Europe. Recently, scholars have suggested that the standard 'canon' of thinkers in IR fails to account for the wide variety of thinkers and approaches to world politics that characterized the early field of IR, a 'tradition' invented for contemporary political and intellectual purposes (Ashworth 2013; Owens et al. 2022).

Following the Second World War, IR scholars—including émigrés from Europe who joined American academia—developed 'classical realism' as a theoretical framework to explain the fundamental laws of international relations. Thinkers in the classical realist tradition include Carr, Morgenthau, Herz, George Kennan, Henry Kissinger, Reinhold Niebuhr, Nicholas Spykman, Martin Wight, and Arnold Wolfers. Morgenthau (1948), one of the leading scholars in this tradition, argued that 'international politics, like all politics, is a struggle for power', which in turn calls for an effort to maintain peace. Reflecting a key aspect of classical realism, he saw the pursuit of power as part of human nature and focused his analysis on the different forms that power could take in the international realm. Morgenthau outlined six principles of realism: human nature generates the laws that govern politics; power is the main concept in international politics; power is an objective and universal category; no moral laws can claim universal validity; national interests are not universally valid; and politics is an autonomous sphere of human action (Morgenthau 1948: 4–15). He distinguished between the preservation of power (status quo), its augmentation (imperialism), and its demonstration (prestige). The ability of each state to pursue its own interests was limited, he posited, by the power that it possessed (**see Box 9.3**).

The inevitable instability of the anarchical international system encouraged scholars such as Morgenthau to seek a global 'balance of power' that could guarantee stability, at least temporarily (**see Box 9.2**). Yet, in the

---

> **Box 9.3** Key quote
>
> International politics, like all politics, is a struggle for power. Whatever the ultimate aims of international politics, power is always the immediate aim. Statesmen and peoples may ultimately seek freedom, security, prosperity, or power itself. They may define their goals in terms of a religious, philosophic, economic, or social ideal. They may hope that this ideal will materialize through its own inner force, through divine intervention, or through the natural development of human affairs. But whenever they strive to realize their goal by means of international politics, they do so by striving for power.
>
> *(Hans J. Morgenthau [1955] 1948: 13)*

face of the threat posed by nuclear weapons after 1945, Morgenthau abandoned the balance of power and proposed a form of global governance in its place (Craig 2007). For Herz (1950: 157–180), the balance of power could not offer security against the violence and precariousness that characterized the bipolar system of the cold war. By highlighting the fragility of the

international system, Herz offered an alternative interpretation of realism, which highlighted the irrationality of human nature.

> **Key Points**
>
> - Realist approaches to international politics have a long history, with scholars in diverse intellectual traditions advancing a view of politics as motivated by power and self-interest.
> - Many ancient and early modern thinkers held a pessimistic view of human nature, where self-interest, fear, and ambition inevitably lead to conflict.
> - Realism as an approach in academic IR emerged in Britain and the United States in response to the atrocities of the world wars, and many of its leading proponents claimed to be part of a longer tradition that included these earlier thinkers.
> - Classical realists typically perceive power struggle between states as an important factor in shaping international relations.

9.4 Geopolitics

The study of physical space has been a central part of realist thought in the twentieth century. Geopolitical thought emerged at the turn of the twentieth century in the context of imperial rivalry. As European empires competed for territorial expansion, **geopolitics** provided a historical-sociological explanation of international relations, as well as a plan for political action. Inspired by German geographers such as Friedrich Ratzel (1844–1904), the British geopolitical thinker Halford Mackinder (1861–1947) suggested that geographical knowledge—including, for example, topography, cartography, population density, and natural resources—should direct the foreign policy of the British Empire. Based on cartographic analysis, he provided a power-driven interpretation of world politics aimed at extending and reinforcing the British Empire on a global scale (Mackinder 1904).

In the United States, Ratzel's ideas inspired international thinkers including the geographer Ellen Churchill Semple (1863–1932), who saw international relations as the interaction between the physical environment and competing civilizations. In contrast to Mackinder, whose geopolitical thought centred on the 'Heartland' landmass as the 'geographical pivot of history', the American naval officer and historian Alfred T. Mahan (1840–1914) provided an influential

geopolitical thesis focused on sea power. His major work, *The Influence of Sea Power upon History* (Mahan 1918 [1890]), argued that the United States could no longer embrace a policy of international isolation, and aimed at normalizing the United States' imperial and expansionist aspirations. Reflecting his anxiety about rising Japanese power in the early twentieth century, Mahan's geopolitical military strategy was grounded in white supremacist beliefs; he predicted a global race war (Ashworth 2022).

The interplay of the natural environment and world politics interested both International Relations scholars such as Yale professor Nicholas Spykman (1893–1943), and Princeton geographers Harold Sprout (1901–80) and Margaret Sprout (1903–2004), who saw space as a condition of state power and endeavoured to understand how material conditions could shape the international system. For Spykman (2017 [1942]), geopolitics was the core of realist thinking in IR because it formed the foundational conditions for political strategy. After the Second World War, Harold and Margaret Sprout reinterpreted Mahan's sea power theory to envision a new strategy for American imperial expansion overseas. Later, they described a two-way relationship between environmental factors and international relations, encouraging American scholars and policy-makers to

consider the environment as an indispensable factor in foreign policy.

Earlier geopolitical writers such as Ratzel, Mackinder, and Mahan embraced a conservative approach which emphasized great power politics, racial hierarchies, and imperial expansion. Yet alternative geopolitical visions of the relationship between nature and politics emerged after the Second World War, when thinkers like Merze Tate (1905–96) offered a radical, anti-racist realist reading of geopolitics (Savage 2021) (**see Box 9.4**). For Tate, the greatest global threat to humanity is race war, a transcontinental conflict that humanity should avoid by rejecting racism and its practices of domination.

The geopolitical approach to realism persisted through the twentieth century, when Jean Elshtain (1941–2013) offered a gendered geopolitical reading of realist theory. Her feminist scholarship draws attention to the embodied and gendered world of soldiers in war-making and to female experiences and motherhood. Her realism changes the level of analysis of realism, moving from the abstract scale of the state to the individual. Thus, she sought to blur the distinction between the private and the public when analysing geopolitical strategy in war (Elshtain 1995 [1987]). Ann Tickner

(1992) similarly highlighted and more powerfully critiqued the 'masculine' aspects of realist IR theory, and proposed ecofeminism as an alternative approach to the study of the relations between politics and nature (**see Ch. 10**).

Key Points

- Geopolitics, or the study of physical space and its relationship to international relations, was a central part of realist thought in the twentieth century.

- American geopolitical scholars drew on German thinkers to conceptualize foreign policy in terms of the relations between political power and geographical conditions.

- Geopolitical thinkers such as Halford Mackinder, Friedrich Ratzel, and Alfred Mahan advanced racist arguments as part of their geographical studies, aiming to sustain British, German, and American policies of imperial conquest.

- While some geopolitical thinkers like Nicholas Spykman saw geographic conditions as permanent and stable, others, such as Merze Tate, emphasized the dynamic and radical potential of geopolitical analysis.

- Realist thinkers such as Jean Elshtain showed the gendered aspects of geopolitics, offering a feminist alternative.

9.5 Multiple realisms?

Contemporary realist international theory is not a unified and monolithic theory but incorporates many different approaches. Realism has been described as a paradigm, or a family of theories that are united by a set of shared ideas (**see Section 9.2**).

9.5.1 Neorealism/structural realism

One way to differentiate between different types of realist theories is temporal: scholars often distinguish between 'classical realism', which is associated

with the emergence of IR as an academic discipline in the mid-twentieth century (**see Section 9.3.2**), and 'neorealism'/'structural realism', which typically takes as its starting point the publication of Waltz's *Theory of International Politics* in 1979. Two influential approaches to structural realism in contemporary theories of international relations are 'defensive neorealism' and 'offensive neorealism' (**see Section 9.2.5**).

Inspired by new economic and social science methodologies, Waltz outlined an abstract model for the analysis of international relations. His realist theory was based on the view that the international sphere was characterized by a persistent structure of anarchy, in which formally equal political units rely on their own resources to protect and advance their interests. Unlike earlier classical realists, Waltz's theory focuses less on individuals or on human nature, and more on states, and specifically on the 'structure' of the international system of states. The internal constitution of the state—whether it is democratic or not—matters less than its position in the international balance of power. While states have an equal place in the anarchical structure, they differ in their power, which Waltz conceptualizes as 'capabilities'.

Waltz's approach is often described as 'defensive realism' because it suggests that states should adopt moderate and restrained policies to attain security. According to this view, the decisive factor in international relations is the distribution of power, or 'capabilities', across different states. Each state is concerned with its own survival, and therefore worries about the possibility that other states may gain greater capabilities and become a threat. Thus, while states pursue power in the international realm, their goal is security and survival, and not maximizing power for its own sake. The structure of the international system has a strong tendency to balance powerful revisionist states—states that seek to challenge the status quo—through the formation of balancing coalitions. For structural realists, the number of 'great powers' in the international system determines the overall structure of the system. In the contemporary period, we live in a 'multipolar' order with several centres of power (**see Ch. 6**), while the post-1989 era was defined as 'unipolar', dominated by the United States (**see Ch. 5**), and the cold war 'bipolar' system was dominated by the United States and the Soviet Union (**see Ch. 4**).

A different interpretation of structural realism is the 'offensive' approach of John Mearsheimer (2001), who provides an alternative account of the dynamics

of power in the anarchical system. Mearsheimer agrees with Waltz that the survival and security of the state depend on the structure of the international system, but doubts that this structure can generate balancing coalitions. Unlike Waltz, he suggests that the offensive pursuit of power is a central feature of international relations because, despite the often frequent and tragic outcomes of war, it provides the only guarantee of a state's survival. Mearsheimer argues that states must maximize their accumulation of power because of their uncertainty regarding the behaviour of other states. In an anarchical system dominated by constant potential threat, states are rationally interested in maximizing their power in the short term to defend their interests and survival in a potentially hostile environment. Mearsheimer does not suggest that states should pursue power and hegemony for their own sake. Rather, the security dilemma implies that under anarchy and inevitable uncertainty about states' future intentions, being as powerful as possible is the best way to survive (Mearsheimer 1990).

Under international anarchy, the fear for survival leads states not only to seek to increase their absolute power, wealth, and influence, but also to increase their advantage over other states. This is the problem of relative gains, which is a concurrent concern for realist thinkers (Powell 1991; Grieco, Powell, and Snidal 1993). More than liberals, realists focus on how the gains from cooperation are distributed among partners: they argue that if one state gains more than another, it will become more powerful, and could eventually threaten its weaker partner. Thus, improving a state's position in absolute terms does not necessarily entail more security (Walt 1998). Other realists, however, criticize the distinction between 'relative' and 'absolute' gains, suggesting that states seek to gain more than their rivals in the short term out of conviction that these advantages will lead, in the long term, to absolute gains (Donnelly 2000: 60).

Neorealism seeks to provide an elegant, simple, and abstract theory of the dynamics that govern the international system. Neorealists have drawn on **rational choice** theory, a methodological approach that explains social outcomes in terms of goal-seeking agents who act under constraints, and which often stresses the benefits of simple, generalizable, and formal theoretical models. Some neorealists have employed—to varying degrees—mathematical models, game theory, and economics scholarship to develop theoretical knowledge about international relations (e.g. Schelling 1960;

Keohane 1984; Oye 1986). During the cold war, rational choice theory informed attempts to theorize strategies of nuclear deterrence and models that could predict the outcomes of government actions in a nuclear crisis (Allison 1969).

9.5.2 Neoclassical realism

Neoclassical realism seeks to merge classical realism's emphasis on domestic institutions, leadership, and political perceptions with neorealism's systemic view of international affairs (Lobell, Taliaferro, and Ripsman 2009). It is also an effort to embed classical realist concepts in the rigorous scientific methodologies of neorealism. For neoclassical realists, structure is important, but so are the agents who are tasked with interpreting the structural constraints of the international system. Therefore, states do not always respond to stimuli from the international system or act to maintain a balance of power as realists would expect (Zakaria 1998). While accepting the priority of the anarchic international structure for shaping foreign policy decisions, neoclassical realists argue that the internal cohesion of the state and society can directly and causally affect how it behaves in the world and in ways that neorealists would not be able to predict by looking at the structure of the international system on its own.

Unlike neorealists, neoclassical realists emphasize the role of poor decisions and ineffective bureaucracies in weakening the state regardless of its material power. Neoclassical realism draws on the work of earlier classical realists to contend that foreign policy experts shape decision-making through their interpretation of stimuli in the international system. Thus, neoclassical realists recognize that decision-makers, foreign policy institutions, and state bureaucratic structures must manage and channel material resources to achieve national interests (Wohlforth 1993). Yet, compared to classical realism, neoclassical realism puts less emphasis on human nature and the pursuit of power.

Scholars have identified three types of neoclassical realism. Type I tries to explain foreign policy anomalies that are not explained by structural realism by combining the dynamics of internal state factors with structural realist analysis (Rose 1998). Type II neoclassical realists (Kitchen 2010; E. Götz 2019) attempt to explain the broader foreign policy and grand strategies of states, not just their errors. They emphasize the structure, perceptions, and political calculations of leaders and states, accepting that irrational behaviour

constrains states' ability to respond to foreign policy stimuli. Finally, Type III neoclassical realists actively challenge the assumptions and claims of structural realism as a paradigm/theory of international relations (Ripsman, Taliaferro, and Lobell 2016).

9.5.3 Realism and rising powers

The realist perspective has appealed to many scholars trying to understand international affairs from the perspective of non-Western states. Chinese and Russian realists have examined the relevance of realism for explaining and guiding the foreign policy of their countries as new rising powers and for analysing power transition in the international system (see Box 9.5).

In China, the realism of Yan Xuetong (2020b) embraces the fundamental tenets of classical realism, including the balance of power, state-centrism, and the pursuit of hegemony, to discuss the current challenges

---

Box 9.5 Power transition theory

Power transition theory (PTT) seeks to understand the changing structure and dynamics of hierarchy among states, and how states compete and cooperate in the international system. In doing so, it highlights the importance of relative power relationships. It primarily examines why and how states gain or lose hegemony in a global or regional context.

PTT is related to—yet distinct from—realist theory. Like realism, PTT finds that power is the currency in world politics. Yet PTT rejects the realist assumption that the international sphere is anarchical and assumes that it is ordered *hierarchically*. The theory highlights how domestic politics and inter-state relations affect how states engage in world politics by shaping state identity, norms, and types of regimes. PTT attempts to outline what makes certain states 'great powers' by analysing their economic and military power, and their ability to influence the outcome of events (Tammen, Kugler, and Lemke 2000). By analysing both structural and dynamic features in the international system, PTT offers a probabilistic theory that tries to predict when war might break out among great powers and their allies, and among smaller regional powers.

Like mainstream IR theories, PTT has implications for real-world foreign policy objectives. The current public and scholarly debate in the US about power transition between the US and China draws on PTT to discern what US foreign policy ought to do. Graham Allison's (2017) work on US–China relations argues that underestimations and misinterpretations among elites in both the US and China make war more likely, but not inevitable. He draws on economic growth data to suggest that China is a rising power and that it aspires to displace the United States (see Opposing Opinions 9.1).

---

in US–China relations. Drawing on Morgenthau, he suggests that both military capabilities and moral principles ground a state's claim to political power in the international realm. Rejecting the notion of a single comprehensive 'Chinese realism', he advances a vision of China as an authoritative—yet humane—world

hegemon. For Yan, transformations of the balance of power depend not only on systemic factors, but also on the quality and ability of political leadership (see Opposing Opinions 9.1).

Modern Russian international theorists draw on classical realism to highlight the importance of national

---

Opposing Opinions 9.1   Realist theory shows that China can become a superpower peacefully

For

Economic development. In the past decades, China has developed its domestic economy and expanded its markets internationally (A. Goldstein 2005). China is now the world's leading manufacturing nation and is predicted to surpass the United States as the world's largest economy in terms of gross domestic product (GDP) by the early 2030s. China's rise through economic growth has not been nearly as competitive or dangerous as feared, because structural forces driving major powers into conflict are relatively weak and allow for peaceful economic development (Gilpin 1981). As Kirshner (2012) argues, although American resistance to the hegemonic claims of China could lead to a violent clash, it may be avoided with good leadership that accommodates some of China's economic ambitions.

Ideology of 'peaceful rise'. As suggested by Zheng Bijian in 2003, China proposes to rise to global hegemony by assuming global responsibilities, building good neighbourhood relations, and maintaining world peace. For some realists, this approach shows that China is not a revisionist state but wishes to uphold the existing status quo (Jalil 2019). China seeks to reassure its neighbours of its peaceful intentions by shelving territorial disputes to attain its bigger objective of global hegemony. For Schweller (2018), the unparalleled nuclear capabilities of the United States guarantee its security. Thus, if the US leadership would be content with less global influence—which he argues to be the current trend—China's peaceful hegemonic claims could generate a new bipolar system.

Effective soft power. Classical realists (Morgenthau 1948) saw diplomacy as an important means to increase political power. Through skilful international projects such as the Asian Infrastructure Investment Bank, the Belt and Road Initiative, and 'Covid-diplomacy' (providing medical aid and preventive equipment), China is gaining international clout in its regional sphere, in Africa, and in Latin America. Thus, economic and aid diplomacy provide China with important sources of hegemony (Cooley and Nexon 2020).

Against

Economic competition could lead to war. Mearsheimer (2001) argues that economic capabilities could lead China to seek military and political hegemony to defend its interests. Such claims could shake the stability of the international system if the United States chose to deter China's ambitions and China responds with offensive action. Thus, economic competition could eventually lead to a military conflict.

The hubris/fear paradox could prevent alternative solutions. For Robert Gilpin (1981), emerging great powers who challenge existing hegemons risk undermining the stability of the international system. Following Carr, Gilpin suggested that revisionist states reject the power equilibrium and demand difficult political concessions from leading states (Carr 1946; Gilpin 1981; Kirshner 2012). Thus, China and the US find themselves trapped in the 'hubris/fear paradox', in which hubris (arrogance) leads the US to overestimate its power, and fear of appearing weak makes diplomatic solutions difficult to achieve.

Mistrust between the US and China could lead to spirals of tension. According to the 'security dilemma', under international anarchy, mistrust between potential rivals can lead each state to seek defensive measures that its adversary may consider as an offensive threat. This dynamic can spark spirals of regional and global conflict. China's hegemonic claims in Asia may generate tensions with its neighbours, who may perceive its growing capabilities as a threat (Christensen 1999). For Christensen (2002), the United States could act as an intermediary in regional conflicts in Asia to provide reassurance against conflict, but such intervention could also increase the chances of war.

1. Do you agree that economic influence can sustain China's peaceful rise to global hegemony?

2. Why, according to Mearsheimer, could China's growth lead to conflict?

3. How does the 'hubris/fear' paradox increase the chances of conflict?

Visit the online resources to discover pointers to help you tackle these questions.

Key Points

- Realism can be helpfully seen as a family of views, sharing key ideas but differing in the emphasis on, and interpretation of, these ideas.

- Unlike classical realists who focused on human nature as the cause of international conflict, neorealists point to the anarchical structure of the international system as the major determinant of great power war.

- Defensive neorealists, like Waltz, argue that international anarchy pushes states to secure a balance of power, which sometimes demands internal state reforms. Conversely, offensive neorealists, like Mearsheimer, argue that states' self-interest drives them to maximize their power and seek hegemony as the only means to security.

- Neoclassical realism seeks to address discrepancies in neorealist theory by embedding a broad range of unit- and subunit-level explanations of foreign policy decisions. Neoclassical realists seek to show that leader preferences, ideology, domestic politics, and perceptions are constraints on states' response to stimuli from the international system.

- Drawing on classical realism and Morgenthau's views, Chinese scholar Yan Xuetong advances an idea of China as a world hegemon reliant on both military power and moral authority. Russian realists embrace a politics of power equilibrium aimed at fostering national sovereignty and security.

9.6 Conclusion

The realist approach to international theory emerged in a specific historical context. During the 1940s, American and British thinkers sought to respond to the supposed failure of international organizations to prevent the Second World War. With its emphasis on the inevitability of conflict and the eternal pursuit of power, realism seemed to provide a persuasive account of state action in the international domain. This chapter has shown that, despite its relatively recent origins, realist thinkers have claimed a longer legacy for this approach that places state power, anarchy, and self-interest at the heart of political behaviour. Drawing on the writings of past political thinkers who engaged with similar topics, realists tend to see continuities as more important than change in international relations. One question for consideration is whether theorizing conflict from a realist perspective serves not only to maintain the international status quo but also to offer alternative visions of radical change, whether linked to postcolonial liberation or to global governance.

Realism continues to be a major theoretical approach to international relations that includes a range of perspectives on politics beyond the state. Various interpretations of realism share common tenets, such as an emphasis on a pessimistic view of human nature, conflict, power, statism, survival, and self-help. While realists do not reject morality as such, they offer an alternative ethics in international politics which aims to guarantee the security and survival of the state.

Although, for some, globalization's promise of prosperity, peace, and unity and its fundamental assumption of global interconnectedness were seen as the end of realist politics, realist thinkers have adapted their theories to current global political conditions. Realists therefore argue that the process of globalization has not abolished the political importance of states, in either theory or practice. States continue to be the main actors in international relations. Unlike liberals, who typically see the global dissolution of national boundaries and increased cultural uniformity as a promise of peace and harmony, many realists diagnose an increased international vulnerability. Realism recognizes the challenges of conflict, competition, and violence in contemporary politics, and offers a vision of careful and responsible political action.

Questions

1. What is the principle of the 'balance of power'?
2. Do you agree with the conception of human nature in the realist approach to IR?
3. Do you think there is one realism, or many?

4. How would a realist analyse the global political response to the Covid-19 pandemic?
5. How would a neorealist describe the international role of the United Nations?
6. What is the role of violence in realist international theory?
7. How does realism explain international cooperation?
8. What is Machiavelli's view on the role of morality in politics?
9. What is the influence of mistrust on security?
10. According to neorealism, should states be more concerned with relative or absolute gains, and why?

Visit the online resources to test your understanding by trying the self-test questions.

Further Reading

Carr, E. H. (2016 [1939]), *The Twenty Years' Crisis, 1919–1939* (London: Palgrave Macmillan). A classical realist argument about the importance of power to international politics.

Henderson, E. (2015), *African Realism?: International Relations Theory and Africa's Wars in the Postcolonial Era* (London: Rowman & Littlefield). An analysis of realist international theory from the vantage point of Africa.

Mearsheimer, J. (2001 [1992]), *The Tragedy of Great Power Politics* (New York: W. W. Norton). A major account of offensive realism.

Morgenthau, H. J. (1955 [1948]), *Politics Among Nations: The Struggle for Power and Peace* (New York: Alfred A. Knopf). Presents an influential realist interpretation of power politics.

Tate, M. (1942), *The Disarmament Illusion: The Movement for a Limitation of Armaments to 1907* (London: Macmillan). A critical appreciation of the difficulties of disarmament in international relations.

Waltz, K. (1979), *Theory of International Politics* (Reading, MA: Addison-Wesley). The foundational work on structural realism.

Williams, M. C. (2004), *The Realist Tradition and the Limits of International Relations* (Cambridge: Cambridge University Press). A re-examination of key thinkers in the realist tradition.

Yan, X. (2020), *Leadership and the Rise of Great Powers* (Princeton, NJ: Princeton University Press). A contemporary realist international theory from a Chinese perspective.

Visit the online resources to access the latest updates in the field of International Relations.

Chapter 10

Feminism

HELEN M. KINSELLA

Framing Questions

- **Are feminist International Relations theories necessary for understanding international politics?**

- **What do feminist International Relations theories provide for understanding international politics?**

- **How have feminist International Relations theories influenced the practice of international politics?**

Reader's Guide

Feminist international relations theories are diverse, proliferating, and transforming the field and practice of international politics; in different forms, they have been part of the field of International Relations since its inception (Ashworth 2014). This chapter introduces the reader to international feminism, highlighting the gains made during the United Nations Decade for Women (1975–85) in collecting information about, and data on, women's experiences, roles, and status globally. Feminist International Relations theories that emerged soon after the decade's end drew from varieties of feminism and the wealth of knowledge developed during that time to critique the exclusion of women and gender from the discipline of International Relations, and the erasure of female scholars of international relations (Owens 2018). This chapter defines liberal, critical, postcolonial, and poststructural international feminist theories and illustrates the purchase they provide on issues such as global governance, war and violence, and international political economy.

Visit the online resources to access an interactive timeline of how the discipline of International Relations has evolved.

10.1 Introduction

The end of the cold war and the emergence of new theoretical debates set the broader context for the revitalization of feminist theories of international relations. These two events, one global and the other disciplinary, together reduced the credibility of the dominant approaches in the discipline of International Relations in two ways. Both the unexpected political alteration in the international system and the introduction of influential new actors in world politics—such as international networks, non-state actors, and users of social media—required new forms of understanding and new methods of research. Additionally, in the social sciences, explanatory theory (which holds that the world is external to and unaffected by theories of it) was rapidly losing credence because identity and cultural politics challenged its ontology (ways of being), epistemology (ways of knowing), and methodology (ways of studying) (**see Ch. 1**). Instead, what is often called **constitutive theory** (which holds that the world is intrinsic to and affected by theories about it) was deemed the better choice, because it eschews ahistorical and transcendental explanation. It also allows for the study of language, identity, and difference—all of which seemed necessary for understanding the complexity of world politics in which struggles over social identities and cultural meanings are inextricable from demands for reforms in institutions and law.

Feminist International Relations theories are constitutive, interdisciplinary theories, and the only ones in the field of International Relations that consistently prioritize the study of women and/or engage in significant debates over the meaning of gender (**see Box 10.1**). The meaning(s) of gender is (are) contested in feminist theories and in feminist International Relations theories. For now, we can start with Terrell Carver's (1996)

statement that 'gender is not a synonym for women'. Although more will be said on definitions of gender (**see Ch. 17**), it is fair to say that at the start of feminist International Relations theorizing, gender was understood to be primarily about social construction of biological sex differences.

10.2 What is feminism?

An introduction to feminist International Relations theories must begin with a working definition of **feminism**. There is no single definition of feminism, just as there is no single definition of liberalism or Marxism. Notwithstanding this, it would be correct to say that feminism is fundamentally rooted in an analysis of the global subordination of women—which can occur economically, politically, physically, and socially—and is dedicated to its elimination. Feminism promotes equality and justice for all women, so that women's expectations and opportunities in life are not unfairly curtailed solely on the basis of being a woman. Consequently, feminism is also an analysis of power and its effects.

Feminism has contributed to the development of new methods of research and forms of knowledge.

> **Box 10.1** The social construction of gender
>
> 'Throwing like a girl' is one way in which we can understand social construction—having female sex characteristics is presumed to define the innate capacity to throw a ball. And yet we know that access to sports and training opportunities, and expectations and encouragement to do so, have nothing to do with biological sex. Instead, they have everything to do with social order and expectations. Therefore 'throwing like a girl' is neither natural nor accidental. Moreover, the very statement is laden with judgement as to the worth of such a throw. To throw 'like' a girl is an insult. To throw like a girl is to be lesser in relation to throwing like a boy—supposedly its only and natural opposite.
>
> According to feminist theorists, these binary oppositions—in which the primary and superior one (i.e. man) defines the desired norm (i.e. masculinity) and the secondary inferior one (i.e. woman) functions as the failure of the norm (i.e. femininity)—structure most social, political, and economic meanings. The opposition is not simply symmetrical but is also hierarchical. In other words, what we associate with masculinity is encoded as privileged and positive, while what we associate with femininity is encoded as subordinate and negative. This encoding 'de-valorizes not only women, but also racially, culturally, or economically marginalized men' (Peterson 2003: 14). For example, to be rational, autonomous, and independent is associated with men and masculinity, while to be irrational, relational, and dependent is associated with femininity. Feminists argue that these hierarchical binaries function as ahistorical and fixed, and they are presumed to be self-evident and universal. This constrains understanding of the *construction* of differences, which cannot be reduced to the simple opposition of men versus women, because these binaries are falsely taken to *explain* differences.

Making women's diverse experiences, roles, and status visible required that feminists re-examine and rewrite histories which either excluded women altogether or treated them as incidental, and that they reformulate basic concepts to address their gendered definitions. For example, feminist historians re-conceptualized conceptions of power to demonstrate how women exercised indirect, personal, or private forms of power when denied the opportunity to exercise power directly, socially, or publicly. In doing so, feminists have tried to understand what women are saying and doing, rather than relying on what men are saying about, and doing to, women. This effort had the effect of denaturalizing women's experience, roles, and status as simply given by their biological sex, instead exposing the ways in which social, political, economic, and cultural relations constructed interpretations of women's identities, experiences, status, and worth.

Feminism informs both theories and vibrant social movements, making the interplay among theorists, practitioners, policies, and practice a vital part of its definition and generating an evolving sense of what it means to be a feminist or to practise feminism. Consequently, definitions of feminism have changed over time, reflecting changes in both social contexts and understandings of the situation and status of women. Issues of race, imperialism, and sexuality emerged in the late 1970s and early 1980s, as they had in earlier decades of women's international thought—e.g. the early twentieth-century writings of Rosa Luxemburg, Emma Goldman, and Merze Tate bring this into particularly sharp focus, and they continue to inflect feminist theories and feminist movements today (**see Chs 11, 17, and 18**).

During the late 1970s and early 1980s, both Global South and Global North feminisms struggled to accept and incorporate the experiences of lesbian/bisexual women into their analyses of subordination and into their movements for liberation, while women of colour (in both the Global North and South) challenged white women (in both the Global North and South) to confront their racism and their privileging of white experiences as a template for feminist action. Although it may be harder to imagine now, lesbian/bisexual women were explicitly and implicitly asked to hide their sexuality for fear that it would jeopardize the credibility of the feminist movement. Cast as 'abnormal' and 'deviant', lesbian/bisexual women confronted the homophobia of the feminist movement and questioned its claim to universal 'sisterhood'. Transwomen

have been forced to do the same, confronting the exclusionary elements of feminist thought and holding feminism accountable to its claim of an inclusive, intersectional politics. Barbara Smith, an influential political activist and a founder of the powerful Black feminist Combahee River Collective (**see Box 10.2**), wrote in the 1990s: 'Feminism is the political theory and practice that struggles to free all women: women of colour, working-class women, poor women, disabled women, lesbians, old women, as well as white, economically privileged heterosexual women. Anything less than this vision of total freedom is not feminism' (B. Smith 1998: 96). Twenty-one years later, she notes, 'gaining rights for some while ignoring the violation and suffering of others does not lead to justice. At best it results in privilege' (B. Smith 2019).

Similarly, women from the Global South argued that 'feminism as *appropriated and defined* by the west has too often become a tool of cultural imperialism'. In the words of Madhu Kishwar, a pioneering Indian scholar and activist, 'the definitions, the terminology, the assumptions . . . even the issues are exported west to east . . . and we are expected to be the echo of what are assumed to be the more advanced movements of the west' (Kishwar 1990: 3). These critiques challenged the presumptions of particular Western, European feminisms that perjured, rejected, or colonized indigenous forms of feminism, and ignored the legacies of imperialism and exploitation. Many women from the Global South were loath to define themselves as feminist. The great Nigerian novelist Buchi Emecheta explained it this way: 'I do believe in the African type of feminism. They call it womanism because, you see, Europeans don't worry about water . . . you are so well off' (Emecheta

---

> **Box 10.2** The Combahee River Collective Statement (United States, 1977)
>
> We are actively committed to struggling against racial, sexual, heterosexual, and class oppression . . . [because the] synthesis of these oppressions creates the conditions of our lives . . . As Black women we see Black feminism as the logical political movement to combat the manifold and simultaneous oppressions that all women of color face . . . We realize that the liberation of all oppressed peoples necessitates the destruction of the political-economic system of capitalism and imperialism as well as patriarchy . . . If Black women were free, it would mean that everyone else would have to be free since our freedom would necessitate the destruction of all the systems of oppression.

1990). The words of Kishwar and Emecheta also highlight the disconnect that many women from the Global South felt about the agendas of Global North feminism. Who decides on the priorities of a feminist agenda? Is there just one? Who shares in it? One answer is found in the Women's Manifesto for Ghana (2016 [2004]) which identified a 'set of demands for the achievement of gender equality and equity and sustainable national development', drawn from the experiences of African feminists.

It is difficult to convey the depth and intensity of these earlier debates among women and the intensity and nuance they expressed. Yet these tensions and debates informed the evolution of feminism and feminist movements as—in a process not yet ended nor fully successful—each strove for a more integrative understanding of women's experiences and status and, in particular, strove to gain purchase on the ways in which they intersected with other elements of identity—such as race, sexuality, class, geographical location, and age. To understand women's experiences, status, and roles, the differences among women, as well their similarities, had to be at the forefront of any organizing. Thus, feminism is not only about asking, in the words of feminist International Relations theorist Cynthia Enloe, '*where* are the women?', but also ensuring that her question is nuanced to ask *which* women are *where*?

It was not until the 1970s that we were even able to begin to answer these questions, for until then we lacked the information to do so. The International Women's Year conference of 1975, held in Mexico City, was the most visible origin of women's global organizing for the twentieth century. As a result, in 1975 the United Nations formally designated 1976–85 as the United Nations Decade for Women. This was pivotal because it encouraged and legitimized research and action on the experiences, roles, and status of women globally, highlighting not only the stark absence of attention to women, but also the magnitude of women's contributions. Research on women's lives and opportunities signalled the validity and importance of women's issues. If at the start of the Decade for Women 'study after study revealed the lack of statistical data and information about women', by its end this was less true (Fraser 1987: 21). It was during this decade that the United Nations Development Fund for Women (now known as UN Women) and the International Research and Training Institute for the Advancement of Women (INstraw) were founded, and the United Nations Convention on the Elimination of All Forms of Discrimination Against Women

(CEDAW) entered into force. Think about that: it was only about 50 years ago that the international community accepted—and somewhat grudgingly at that—that knowledge and understanding of women's experiences, status, contributions, and concerns were worth pursuing. The knowledge subsequently gained was groundbreaking, revelatory, and revolutionary.

For instance, Ester Boserup's book *Women's Role in Economic Development*, published in 1970, challenged conventional economic and social development programmes by proving that women were essential to productive—as well as reproductive—processes and to developing nations' economic and social progress. This led to an entirely new development agenda at the United Nations, 'Women in Development'. Until that time, international and national actors and organizations did not recognize or support women's essential economic roles, productive and/or reproductive. Moreover, the waged and unwaged work of women was seen as incidental to the overall progress and development of the state. Most significantly, the work undertaken during this decade exposed the fundamental inequalities of women's status and experience, both globally and domestically. To be clear, it was not that there were no international movements or organizations dedicated to increasing the opportunities and status of women before this time (for example, **see Case Study 10.1**). Rather, it was because the United Nations Decade for Women was the first extended period of time when the United Nations and its member states were forced to grapple with the experiences, status, and roles of women globally, as a direct result of lobbying *by* women, and ultimately to take responsibility for alleviating the subordination of women.

International Women's Day 2016 march held in downtown Toronto
© WENN Rights Ltd / Alamy Stock Photo

An Italian peacekeeper paints on a wall of the United Nations Interim Force in Lebanon (UNIFIL) headquarters during the International Day of Peace in the southern Lebanese town of Naqura
© MAHMOUD ZAYYAT / Stringer / Getty Images

The Women's International League of Peace and Freedom (WILPF) is the oldest formal women's international peace organization in the world. It began in 1915 at an international gathering of women who had come together during the First World War endeavouring to end that war and all wars. In the decades since, WILPF has been a strong and vocal actor in pursuing world peace through economic and social justice, women's rights, and disarmament. From its inception, WILPF articulated the necessity of including women, and women's experiences, in all elements of international and domestic politics. One of its first efforts was to ensure that the mandate of the League of Nations addressed the participation and status of women in international politics, and that the League undertook an inquiry into the legal, social, and economic status of women—the first of its kind.

Throughout its history, WILPF has been forced to deal with many of the divisive issues caused by its original membership and

organization as Western, primarily European, affluent women. However, as historian of its work Catia Cecilia Confortini writes, even if WILPF was not founded as a self-consciously radical organization, it evolved into 'a leading critic of militarism, racism, sexism, environmental destruction, and unfettered capitalism, emphasizing the connection between all forms of oppression and exclusion' (Confortini 2012: 8). One of its recent notable successes has been its leadership (through its spin-off PeaceWomen) in monitoring the Women, Peace, and Security (WPS) agenda.

The WPS agenda is the result of the concerted effort of feminist organizations and civil society to educate the United Nations and other international and national actors and organizations as to the necessity of the equal and full involvement of women in all processes of peace and security. Since the adoption of the historic resolution SC 1325 in 2000, the first ever Security Council resolution to directly address the role of gender in conflict, nine more resolutions have advanced and detailed the ways in which gender, understood as one axis of difference, matters in understanding and resolving conflict. Although these resolutions have been widely hailed, there is a significant gap between aspirations and actual support, and implementation is plagued by a lack of political will and economic commitment by member states. Moreover, as women's rights become more contested globally, due in part to the rise of far-right and authoritarian governments, efforts have been made to weaken the WPS agenda and undermine progress. For example, SC 2467 (2019), which sought to further address sexual violence in armed conflict, was only adopted after explicit references to women's rights to sexual and reproductive health were omitted (Aoláin 2019).

Question 1: WILPF's trajectory has changed over its decades of activism; what might have influenced this change?

Question 2: The WPS agenda has only taken root in the United Nations since 2000; what changes in international politics contributed to its introduction?

Thus, we can argue that women suffer global subordination because we now know, through data collected over several decades, that neither states nor households distribute resources and opportunities equally between men and women. Consider some relevant statistics. Globally, women earn 19 per cent less than men, and while it was previously estimated it would take 257 years to close the global gender pay gap, the impact of Covid-19 added decades to that estimate (ILO 2018, 2022; UN Women 2020a).

In the United States, women make approximately 82 cents for every dollar that men make. When this figure is broken down in terms of race, African American women earn 62 cents for every dollar that white men make, Native American women 57 cents, and Latinas

only 54 cents. Worldwide, women do three times as much unpaid and care work as men, which directly impacts their capacity to engage in waged work. Further, 40 per cent of global economies have gender-specific job restrictions which impede women's ability to earn an income outside of the home (World Bank 2021b). In 2020 only 26 women were heads of state, while violence against women human rights defenders and women in politics has increased with the rise in authoritarian governments (UN Women 2020a; Kishi 2021). Gathering statistics such as these was and is crucial to feminist knowledge, politics, and practice. Thus in 2011, due to feminist organizations' work and lobbying, the United Nations recommitted itself to researching and collecting accurate statistics on women. This

commitment is all the more crucial considering the regressive gendered and racialized impact Covid-19 has had on equality and equity, and the particular burden borne by women of colour globally (Oxfam 2021*b*).

The United Nations Decade for Women sparked an outpouring of resources and information through the work of women's organizations, networks, and gatherings, as well as the flourishing of research and analysis on women's experiences, roles, and status. It could no longer be said that women did not matter to the study of international relations, or that feminists had no claim on influencing and explaining the events of international politics. And yet the discipline of International Relations was silent. It was in this context that feminist International Relations theorists began to make their mark on the discipline of International Relations. Importantly, the revitalization of feminism and of attention to women in international politics that occurred during the United Nations Decade for Women does not mean that forms of feminism or active women scholars were utterly absent prior to this. As International Relations scholars have demonstrated, the histories of feminist international relations and of women scholars

were erased after the Second World War (Ashworth 2011; Owens 2018). Thus, the UN Decade for Women marked a revitalization of feminism and recognition of female scholars of international relations.

> ### Key Points
>
> - Feminism has no single definition.
> - Feminism is concerned with equality, justice, and the elimination of women's subordination and oppression.
> - Feminism and feminist movements struggle with issues of inclusion and exclusion, specifically regarding race, sexuality, class, and geographic location. By asking not only 'where are the women?', but also 'which women are where?', feminism and feminist movements work towards overcoming exclusions.
> - Without feminism and feminist movements, women's experiences and roles would have remained of little importance or interest to states.
> - Feminism and feminist movements have succeeded in radically changing the understanding of international organizations and states regarding women's significance for, and contribution to, international politics.

10.3 What is feminist International Relations theory?

Feminist International Relations theories that emerged in the late 1980s arose from a disciplinary dissatisfaction with the conventional and dominant theories and methods of International Relations. Feminist scholars had no interest in advocating or defending any particular dominant approach. Rather, the positivist, rationalist theories of realism/neorealism and liberalism/neoliberalism were seen as restricting the pursuit of knowledge about international politics writ large, as well as excluding different post-positivist approaches to international politics, such as interpretive, ideational, or sociological approaches (**see Chs 7, 9, and 13**). Feminist International Relations scholars pointed out that neither the positivist nor post-positivist approaches paid particular attention to women, much less to gender. To remedy this, feminist International Relations scholars were intent on identifying and explaining how the essential theories, concepts, and case studies of International Relations were, at the very least, partial, biased, and limited because they reflected only (certain) men's experiences, roles, and status. As Charlotte Hooper explains, feminist scholars made obvious how 'the range of subjects studied, the boundaries of the

discipline, its central concerns and motifs, the content of empirical research, the assumptions of theoretical models, and the corresponding lack of female practitioners both in academic and elite political and economic circles all combine and reinforce each other to marginalize and often make invisible women's roles and women's concerns in the international arena' (Hooper 2001: 1).

While feminist International Relations theorists first advocated, at a minimum, for including women in the study of international politics, it was with the full recognition that to do so was not simply to expand the scope of the field, but also to radically alter its predicates. The study of women would not only introduce a new subject, it would also demand a critical analysis of the presuppositions and presumptions of the existing discipline. V. Spike Peterson (1992) describes these initial efforts as simultaneously deconstructive, in their critique of the state of the field, and reconstructive, in introducing new methods and theories for understanding international politics.

One of the most obvious examples of feminist International Relations theorists' deconstructive and reconstructive work is their analysis of the concept and practice of the state. Women have long been absent from, or sorely underrepresented in, institutions of state and global governance. Representation of women is one of the ways that the United Nations measures the degree of inequality within and across states (see the United Nations Development Programme Gender Inequality Index). The absence of women and/or low numbers of women in positions of government indicates a state that is gender unequal. Gender unequal means that not only are women underrepresented empirically, they are also neglected conceptually as their particular experiences and skills are not integrated into the practice of government. In addition, women are denied the social and political, and sometimes economic, power imparted by these positions. Once this was empirically demonstrated, feminist International Relations scholars queried: why and how had this occurred? And why had the discipline, through liberalism or realism and its derivatives, not previously addressed these questions? One of multiple, complex answers pivoted on the very concept of the state itself: how it had been theorized and defined historically and politically.

Drawing on feminist work in history, anthropology, and political theory, international feminist theorists demonstrated how the concept and practices of the state in its emergence, and even as it changed over time, consistently excluded women from full participation. In addition, feminist International Relations scholars critiqued the discipline's uncritical reliance on such texts and scholars as Hobbes's *Leviathan* and Machiavelli's *The Prince* in articulating its basic precepts. Most immediately, as feminist philosophers and theorists made clear, these authors wrote at a time and in a context in which women lacked full legal status and were considered the property of a male guardian. Women were relegated to ancillary, privatized, and apolitical roles that undermined their economic and social stature and centralized male control. Broadly speaking, this relegation was justified through recourse to arguments that held that women were to be protected from politics due to their innate weakness and emotionality, rooted in their reproductive capacity. Feminist political theorists agree 'the tradition of Western political thought rests on a conception of "politics" that is constructed through the exclusion of women and all that is represented by femininity and women's bodies' (Shanley and Pateman 2007: 3). Feminist theorists demonstrated that this tradition of thought, to which conventional International Relations scholars turn, was fundamentally predicated

on the absence and insignificance of women, as well as highly constructed interpretations of women's character and, essentially, reproductive heterosexuality.

In fact, as Carol Pateman underscores, according to Hobbes, the subordination of women through heterosexual marriage is a necessary step in the establishment of civil society and eventually the state. She writes 'through the civil institution of marriage men can lawfully obtain the familiar "helpmeet" and gain the sexual and domestic services of a wife, whose permanent servitude is guaranteed by the law and sword' (Pateman 2007: 67). Thus, the state regulated that men were rulers and women were to be ruled through a constant state of legal and social violence. Consequently, the state could not be said to be a neutral concept or institution, but is a 'main organizer of the power relations of gender' in both its formal expression and effects (Peterson 1992: 9).

Evidence of this organization of the power relations of gender emerges through an examination of how gender affects the beliefs about, and the institutions and actions of, soldiering and the military. Feminist scholars study how beliefs about masculinity and the roles men are expected to play as protectors of women and as rulers of the state directly impact conceptions of soldiers as male and militaries as masculine. Expectations and beliefs about masculinity are constitutive with expectations and beliefs about soldiers, such that states institutionalize militaries to reflect and consolidate men as soldiers, in part by excluding women from combat as incapable. As Megan MacKenzie demonstrates through her research in Sierra Leone and the United States, holding to this premise requires that we ignore the history and evidence of women's participation in combat. She argues that women's forceful exclusion from the military simply reaffirms male prowess in combat and persists 'primarily because of myths and stereotypes associated with female and male capabilities and the military's "band of brothers" culture' (MacKenzie 2015: 1). As Aaron Belkin points out, this construction of masculinity through the military also has repercussions on men who are not, in effect, soldiers in the band of brothers. These men must justify and defend their own manifestations of masculinity. Soldiers 'attain masculine status by showing that they are not-feminine, not-weak, not-queer, not-emotional' (Belkin 2012: 4). In this way, masculinity is dissociated from some men and is no longer their property by birth, and the fixed binary distinction of men (protectors/rulers) and women (protected/ruled) is shown to

be constructed through the interaction of beliefs, institutions, and politics, which in turn informs and reflects gendered states. Now, the inclusion of women and the relaxation of the norms and requirement of heterosexuality in many state militaries points to the possibility of new configurations of the relationship among military, state, and gender.

The simple empirical question initially posed—where are the women?—led to a re-examination of the historical, conceptual question of the state's formation and emergence. This, in turn, prompted investigation of the effects of the state's historical and conceptual evolution, which ultimately helped to explain the absence of women in state governance and the fundamental gendering of the state. The regulation of social and political relations that ground the state (marriage and the subordination of women) and structure the state (military) are fundamentally relations of power which take women and gender as central to their operation. This analysis also suggests that International Relations scholars' theorizing about state and militaries must deconstruct any facile notions of protector/protected as a natural relationship. Such a conception is decidedly

not natural but legislated; and its effects lead to, for example, the erasure of violence done in the name of protection and violence wielded by women, as well as, as post-colonial feminist scholars detail, the intersection of gender and race in state formation and schemas of protection (Kapur 2018).

> ## Key Points
>
> - Feminist International Relations theories are deconstructive and reconstructive.
> - Prior to the late 1980s, International Relations theories did not consider the role of gender or of women.
> - Feminist International Relations theories introduced the study of gender and of women, and prompted a critical analysis of the existing discipline and its fundamental concepts, such as states and power, as defined by realism, liberalism, and their derivatives.
> - Gender is not a synonym for women, but includes both men and women in its purview.
> - Feminist International Relations theories conceptualize the state as a gendered organization of power.

10.4 Gender and power

Among scholars of gender, how gender and power are defined and understood to be related varies according to the conceptualization of gender itself. Birgit Locher and Elisabeth Prügl (2001) distinguish the use of gender in at least three ways, each of which has implications for understandings of power. As they note, some scholars treat gender as an empirical variable that explains social, political, and economic inequalities, whereby gender is understood as the biological (sex) difference between men and women. Power, then, rests in social, political, and economic hierarchies. This is the approach of liberal feminist international relations. Others identify gender as a social construct that exists in social practices, identities, and institutions. Gender becomes the social interpretation of biological (sex) differences, and power rests in the practices, identities, and institutions that interpret and fix those differences. This is the approach of critical feminist international relations. Finally, some argue that gender is an effect of discourses of power. In this reading, gender is neither biological difference, nor is it the social interpretation of biological difference, but is

itself constitutive of that difference. This understanding of gender identifies it as 'code' for the operation of power, and gender becomes an analytical category that is not necessarily linked to male and female bodies. This understanding of gender requires thinking of gender as a useful analytic even if male and female bodies are absent. This is the approach of poststructural feminist international relations (**see Ch. 12**). Postcolonial feminism is defined less by its theorization of gender, as it encompasses at least two of the approaches—critical and poststructural—in its scope (**see Ch. 11**).

Considering these differences in interpreting gender, it is logical that gender scholars rely on a diverse range of methodological approaches that examine institutions, agents, discourses, and symbols in the production and reproduction of gender in international politics. And, although this chapter discusses four types of feminist International Relations theories, this is an analytic separation for ease of explanation; it does not mean that there are only four, or indeed that these four are wholly conceptually distinct.

> ## Key Points
>
> - The definitions of power and of gender are linked in feminist International Relations theory.
> - There is more than one definition of power and of gender.
> - The definitions of power and of gender influence the kinds of methods and analysis undertaken.

10.5 Four feminist International Relations theories

10.5.1 Liberal feminist international relations

Liberal feminism challenges the content of International Relations, but it does not challenge its fundamental epistemological assumptions (**see Ch. 7**). Liberal feminist International Relations theorists advocate that the rights and representation conventionally granted to men be extended to women. To correct gender inequality, liberal feminists focus on changing institutions, in particular increasing the representation of women in positions of power in the primary institutions of national and international governance. They also highlight the need to change laws to allow for women's participation, which they believe will also correct the distribution of power between the sexes. A recent global initiative to achieve gender parity in international tribunals and monitoring bodies exemplifies this approach. Noting that lack of gender parity has 'serious consequences for international and national justice . . . [and] the under-representation of women in these spaces affects democracies and the guarantee of people's rights', Gqual was founded in 2015 to advocate for change (Gqual n.d.).

According to liberal feminist International Relations theorists, gender inequality is a major barrier to human development and leads to greater incidences of war and violence. In their book, Hudson et al. (2012) maintain that gender inequality, by which they mean the subordination of women, is itself a form of violence. Through a collation of quantitative data (available at http://www.womanstats.org/), the authors argue that the higher the domestic index of social, political, and economic inequality between men and women in a state, the more likely it is that force and violence will be used to settle disputes both within and among states. They contend: 'the fate of nations is tied to the status of women'. Mary Caprioli (2004) similarly claims that gender inequality makes conflict both within and among states more likely. For these authors, systemic gender inequality

and discrimination against women are the root causes of violence.

These are fascinating studies and are well received by policy-makers and the discipline of International Relations. They also raise important questions regarding what exactly is the mechanism by which gender inequality increases risks of violence. Is it, as Hudson et al. (2012) and Hudson and den Boer (2004) suggest, rooted in male sexuality (and a surplus male population) and the evolutionary heterosexual reproductive practices? Caprioli cautions that 'rather than focusing on the genesis of, or justification for differences between the sexes, the more important question should concentrate on how those differences are used to create a society primed for violence' (Caprioli 2005: 161). Other feminists comment that these scholars do not make clear why both questions cannot be investigated simultaneously. They suggest that a more comprehensive approach addresses questions regarding the genesis, justification, and use of the differences between the sexes, rather than presuming that we know in advance what these differences are and that accepting them is the necessary starting point.

10.5.2 Critical feminist international relations

Critical feminists question liberal feminisms for relying too faithfully on the neutrality of their methods, and for their vision of power as a positive social good that can be successfully redistributed without fundamental social change. Many of these feminists highlight the broader social, economic, and political relationships that structure relational power, and they often draw from Marxist theories to prioritize the role of the economy, specifically critiquing the dominance of capitalism as the desired mode of exchange. Critical international relations feminists, drawing on socialist ideas, pay particular attention to the unequal diffusion of global capital accumulation. As Iris Young puts it, 'women's oppression arises from

two distinct and relatively autonomous systems. The system of male domination, most often called "patriarchy", produces the specific gender oppression of women; the system of the mode of production and class relations produces the class oppression and work alienation of most women' (I. Young 1990: 21). Therefore, drawing from both Marxist and socialist thought, critical feminist scholars identify gender and class oppressions as interdependent and intertwined (see Ch. 8). Scholars including Sandra Whitworth (1994) and Elisabeth Prügl (1999, 2017), studying international institutions such as the International Labour Organization (ILO), the International Planned Parenthood Federation, and the World Bank, demonstrate how gender is produced and reproduced through the institutionalization of divisions of 'paid' and 'unpaid' labour. V. Spike Peterson's innovation of 'triad analytics' broadens the view of institutions and economies by analysing globalization through the intersection of reproductive, productive, and virtual economics on which the global economy rests. In her analysis, Peterson draws attention to the 'explosive growth in financial markets that shape business decision-making and flexible work arrangements' and the 'dramatic growth in informal and flexible work arrangements that shapes income generation and family well being' (Peterson 2003: 1). The devaluation of women's work; the still extant differential valuing of reproductive and productive work; the '**double burden**' of household labour and waged labour that women carry disproportionately; and the massive global shifts in the structure of work itself all influence the worldwide feminization and racialization of poverty. Indeed, these factors help to explain why, worldwide, women and especially women of colour were those who were most hard hit economically by Covid-19 (UN Women 2020b, 2021a).

During Covid-19, women were particularly hit by the double burden of household labour and waged labour
© coolmilo / iStock

Like postcolonial feminist theories, these critical feminist theories are wary of **gender essentialism**, which is the assumption of the sameness of all women's experiences by virtue of being female. They critique the normalization of white, affluent women's experiences as universal and instead highlight the dynamic and intersectional facets of identity, of which gender and sex are but two elements. Like postcolonial feminist theorists, critical feminist theorists also emphasize the tight link between feminist theorizing and feminist actions, in part due to their recognition that the marginalized, exploited, and colonized have much to teach about the violent practices of global politics in particular locations. Maria Stern (2005) illuminates how the violence of war affects the intimacies of self and family. Stern questions why the experiences of Mayan women are not considered 'valid texts of world politics', as they illuminate the constitutive topics of war, violence, and security central to the discipline of International Relations (Stern 2005: 56).

Critical and postcolonial feminists were united in their excoriation of the use of feminism, specifically liberal feminism, by former President George W. Bush and his administration to justify the ground wars in Iraq and Afghanistan; to distinguish the United States from those whom it targeted; and, subsequently, to appropriate the putative emancipation of Afghan and Iraqi women as evidence of their victories. According to many feminists, however, not only did this 'embedded feminism' falsely claim a monolithic feminism to be wielded against a supposedly savage Islam, in order to once again 'save' Muslim women, it distracted from the detailed empirical evidence that Afghan women are not now free from violence but rather continue to experience it in other forms (K. Hunt 2006: 53; Kinsella 2019).

10.5.3 Postcolonial feminist international relations

Postcolonial feminism 'link(s) everyday life and local gendered contexts and ideologies to the larger, transnational political and economic structures and ideologies of capitalism' (Mohanty 2003: 504). Focusing on the particular situations, experiences, and histories as materializing colonialism within these larger patterns is a means to confront the universalizing tendency found in much of feminist theorizing.

Postcolonial feminism seeks to situate historical knowledge of the contours of colonialism and postcolonialism as intersecting with economic, social, and

political oppression and change, highlighting the centrality of conceptions of gender and of women to colonial regimes and their continuing effects. Imperialism demanded 'complex household arrangements where white colonizers officially mandated a system of superiority and disdain against' local communities and peoples. 'Yet colonization would not have functioned without these local communities and peoples—especially nannies, maids, houseboys, gardeners, prostitutes, pimps, soldiers, and other coerced workers for the colonial state' (Agathangelou and Ling 2004: 518).

Rules governing proper and improper sex were key to the maintenance of difference between the colonized and the colonizer, and control of sexualities was fundamentally differentiated according to race and position. Only white men were free to have sex with whomever they so desired, often in exploitative proprietary relations of rape and concubinage with women of colour. In contrast, men of colour were policed as savage sexual libertines against whom white women were to be protected and preserved. Highlighting the link between individual households, materiality, and sexuality, postcolonial feminists remind feminism that not all women are colonized equally. Women from the Global North benefited from imperialism as the 'inferior sex within the "superior race"' (quoted in Pettman 1996: 30).

Postcolonial feminism takes as its point of entry the recognition that the feminism of the Global North is rooted in and dependent on discourses of rights and equality that were, and arguably are, of pre-eminent concern to and defined by Western Europe. Rey Chow describes this as the Eurocentric 'hierarchizing frame of comparison' (Chow 2006: 80). Postcolonial feminists also underscore that while colonialism and imperialism may be formally past, their effects are not. Norma Alarcón describes this as the 'cultural and psychic dismemberment . . . linked to imperialist racist and sexist practices [that are] not a thing of the past' (Alarcón 1999: 67). Certainly, the expansion of characteristics said to identify the enemy in a time of global war rejuvenates and vivifies racial and colonial characterizations. For example, in the contemporary war on terror, the freedom of Muslim and Arab men and women, or those who appear to be so, is subject to increased scrutiny through policing and surveillance. The number of traits said to identify the threat—'travelling while brown'—intensifies the alliances consolidated by race and class, while testing those made only by sex (Sharma 2006: 135).

Additionally, women from the Global South are all too often depicted and treated as 'an object of protection from her own kind', to justify the concerted efforts of 'white men saving brown women from brown men' (Spivak 1988: 296). Thus, as feminist scholars note, the existence of those so designated as in need of protection frequently becomes a *rationale* for violence, as it did when the United States launched its ground wars in Iraq and Afghanistan. For this reason, postcolonial feminists resist the imposition of women's rights as 'all too often conceived in terms of paternal relations of protection and benign salvation rather than exercises of agency and sovereignty of women for themselves' (Kinsella 2007: 218; see Case Study 10.2). The embedded feminism of the United States' efforts in Iraq and Afghanistan obscured the decades of agency and mobilization of Iraqi and Afghan peoples on their own behalf. Instead, former President Bush and his administration (standing in for the Global North) portrayed such efforts as the exclusive actions of the United States. In addition, postcolonial feminists suggest that the individualism and autonomy implicit in the definitions of rights and liberties are culturally ill-suited, and that collective and relational rights are a better fit.

Lastly, with the international community only now beginning to respond to climate change and the devastating impacts of resource extraction and environmental exploitation, postcolonial feminists call attention to it as another manifestation of the legacies of imperialism (see Ch. 24). They highlight its differential impact on the Global South, the global poor, and specifically women and girls within those categories. Among the global poor, climate change disproportionately affects women and girls. They comprise the majority of the globe's small-scale farmers and are primarily responsible for producing food to feed their families and their communities. Yet women and girls are struggling due to climate-induced changes affecting temperatures, rainfall, disease, weather patterns, and crop failure which cause widespread food, water, health, and physical insecurities. For this reason, the 2015 Paris Agreement on Climate Change specifically identified gender equity and empowerment of women as fundamental to combating climate change (IPCC 2015). While recognizing this fact, postcolonial feminism cautions against the construction of women and girls as especially responsible for conservation, as being 'closer to nature', and as especially vulnerable, without any corresponding increases in their authority or agency (Arora-Jonsson 2011).

Case Study 10.2 The Revolutionary Association of the Women of Afghanistan

The Revolutionary Association of the Women of Afghanistan (RAWA) was founded in Kabul, Afghanistan in 1977. It was founded to promote women's rights and social justice; to increase women's participation in social, political, and economic activities; and to advocate for a secular democratic state. Its goals were women's emancipation, the separation of religion and politics, economic democracy, eradication of poverty, and networking with other national/international pro-democracy and pro-women's rights groups based on the 'principle of equality and non-interference in internal affairs' (Brodsky 2004: 169).

Founded only a year before the Soviet invasion in Afghanistan, RAWA expanded its activities to resist Soviet rule. RAWA never aligned itself with any other resistance movements, many of which adhered to a more stringent interpretation of Islam than that practised by RAWA's members. RAWA is anti-fundamentalist, but not anti-Islam. Meena, the charismatic founder of RAWA, was murdered in 1987 because of her unrelenting criticism of both sides in the war—Soviet and fundamentalists. In response, RAWA began to hold more public events and to reach out for international support from other women's and human rights organizations. One of RAWA's members, all of whom use pseudonyms for safety, shared: 'we knew there would be more assassinations and imprisonment if we kept silent. If we had a public face and we could make ourselves more known, we could scare the enemy' (Brodsky 2004: 98).

During the Soviet rule and the resultant civil war that preceded the advent of Taliban rule, RAWA members (women and 'male supporters') opened schools in Afghanistan and Pakistan, housing, educating, and employing men and women who fled from Afghanistan due to unremitting war. Under the Taliban, RAWA members in Afghanistan went into hiding; many members were

killed or wounded, and their families threatened and harmed by the Taliban. Notwithstanding this threat, under which it had always operated, RAWA opened underground schools to educate women and girls and founded a magazine which members circulated clandestinely. Every activity RAWA undertook meant its members risked immediate death if discovered, and their lives were actively circumscribed by daily and minute security concerns.

According to RAWA, the rule of the Soviets, the warlords, and the Taliban were marked by similarity in repression and brutality that varied primarily in degree and justification. RAWA roundly criticized the invasion by the United States, not only for its premise but also because of its effects. Moreover, RAWA members noted that indigenous women's rights networks and organizations' expertise and knowledge were utterly ignored in the push to 'liberate' them. RAWA itself was characterized as too radical and dogmatic in its critique of all forms of economic, political, and social repression, and in its advocacy for an Afghan democracy.

Yet RAWA stated in October 2001, during the first months of US military operations, that '[t]he continuation of US attacks and the increase in the number of innocent civilian victims not only gives an excuse to the Taliban, but also will cause the empowerment of the fundamentalist forces in the region and even in the world' (Afghan Women's Mission 2021). Considering the chaotic US withdrawal from Afghanistan in 2021, and the subsequent takeover by the Taliban, this analysis proved sadly prescient.

Question 1: What forms of feminism can you identify in this short description of RAWA?

Question 2: Why would RAWA be or not be an ally to the United States' ground war in Afghanistan?

10.5.4 Poststructural feminist international relations

Poststructural feminism draws most specifically from the scholarship of Judith Butler. Butler argued, contrary to the commonplace and accepted definition that gender is the social construction of sex, that sex is in fact constructed by gender. As might be imagined, her argument caused no end of consternation, for it challenged the seemingly stable and shared attribute of a biological sex of all women. Without this fixed and permanent referent in sex itself, how could it be that 'women' could exist, much less be united across differences of class, sexuality, race, and location? Butler explains that 'originally intended to dispute the "biology is destiny" formulation, the distinction between sex and gender' in fact masks the cultural construction of sex itself. In other words, sex is not the foundation or origin of gender, but is itself an effect. To understand gender as 'a social category imposed on a sexed body' assumes that the sexed body is itself not an effect of power (Scott 1999: 32). To help us grasp this

argument, Butler introduces the concept of gender performativity, which simply means that gender is not what we are, but rather what we do. Cautioning against misinterpretation, Butler points out that gender is not simply what one freely chooses to do (it is not an unfettered performance), but that performativity occurs in highly regulated contexts including that of normative heterosexuality. Socially, one becomes a woman by taking on the imperative to identify with the female/femininity and to desire the male/masculinity. This production of identity is not accomplished in one act, but rather requires constant iteration and bears with it the constant possibility of failure. As Sarah Salih (2002: 58) explains, 'gender is a "corporeal style", an act (or a sequence of acts), a "strategy" which has cultural survival as its end, since those who do not "do" their gender correctly are punished by society'. Evidence of this is seen in the worry, discussed previously in **Section 10.2** with regard to the United Nations Decade for Women, that the presence of lesbian/bisexual women, and now transwomen, would undermine the credibility or coherency of the feminist

movement. Cynthia Weber (2015), along with other queer theorists, draws from the insight about normative heterosexuality, or the 'heterosexual matrix', to continue to analyse how bodies are never merely described, but are constituted in the act of description, calling on International Relations theories to recognize the punitive and productive circulation and regulation of homo/heterosexualities as fundamental to world politics.

As well as subversively reworking gender, poststructural feminism illuminates the constitutive role of language in creating gendered knowledge and experiences. Laura Shepherd (2008) shows this in her analysis of the constitutive effects of the discourses formalized in UN Security Council Resolution 1325. While purporting an emancipatory intent, the resolution consistently reifies women and girls as passive victims of violence

even as it seeks to promote them as agents of change. In a slightly different vein, Kathy Moon (1997) uses interviews, archival research, and discourse analysis to demonstrate how the sexual economy of sex workers figured in the US–Korean security relationships of the mid-1970s. Charlotte Hooper (2001) examines the masculinization of states and states' masculinization of men through a rereading of central economic texts and journals. Overall, what these scholars demonstrate is how gender is created through the workings of international politics and, in turn, how paying attention to this construction reveals relations of power that are otherwise overlooked.

See Opposing Opinions 10.1 for discussion on whether feminism influences states' foreign policy decision-making.

Opposing Opinions 10.1 Feminist foreign policy changes states' foreign policy decisions

For

Feminist foreign policy places gender equality at the crux of foreign policy decisions. During her US Senate confirmation hearings to become Secretary of State, Hillary Clinton vowed, 'I want to pledge to you that as secretary of state I view [women's] issues as central to our foreign policy, not as adjunct or auxiliary or in any way lesser than all of the other issues that we have to confront.' Margot Wallström, former Deputy Prime Minister of Sweden, stated that the 'Three Rs' of feminist foreign policy are rights, resources, and representation.

Feminist foreign policy makes a difference in how states act. In 2018, Sweden insisted that peace consultations to end Yemen's civil conflict include women delegates and, when president of the United Nations Security Council, mandated gender parity in all briefings. In 2010, the United States Quadrennial Diplomacy and Development Review—a blueprint for the US Department of State and the US Agency for International Development—integrated gender into its foreign policy goals and began tracking dollars spent on women-focused programming. The US renewed these commitments in 2020.

Against

Feminist foreign policy does not place gender equality at the crux of foreign policy decisions for its own sake, but merely to legitimate conventional policy goals. Margot Wallström explained that 'striving toward gender equality is not only a goal in itself but also a precondition for achieving our wider foreign, development, and security-policy objectives'. Likewise, Hillary Clinton stated in an interview: 'This is a big deal for American values and for American foreign policy and our interests, but it is also a big deal for our security.'

Feminist foreign policy makes no difference in how states act. Although she was a prime proponent of feminist foreign policy, as Secretary of State, Hillary Clinton never sanctioned other states for their treatment of women and girls. For example, Saudi Arabia remained a vital partner for the US national security strategies in the Middle East. Similarly, although both former President Barack Obama and President Joe Biden share a commitment to a feminist foreign policy, the US did little to ensure the security of Afghan women and girls or heed their concerns during the drawdown of US troops in Afghanistan in 2014 and in 2021. Sweden's relatively weak stature internationally allows it to proclaim a feminist foreign policy without any real risks, and it has yet to engage in any complicated issues of multilateral foreign policy (such as the conflict in Ukraine) under a feminist foreign policy.

1. As Swedish scholar Ulf Bjereld suggests, do 'military defense and feminism represent two branches of the same tree: that citizens' security is guaranteed by having a strong military and that the feminist agenda is guaranteed through diplomacy, aid, and other arsenals beyond defense' (quoted in Rothschild 2014)?

2. Are feminist foreign policy and the Hillary Doctrine iterations of an imperial feminism that serves the interests of only (some) sovereign states and obscures their true goals of military and economic dominance?

3. Does it matter if feminist foreign policy doesn't change state behaviour? How else could it have significant effects on international politics?

Visit the online resources to discover pointers to help you tackle these questions.

Key Points

- These four approaches to feminist International Relations theory help explain the range of feminist theorizing, but do not sum it up completely.
- Each approach offers different insights into the operations of power in international and domestic politics.
- Each approach can be understood best in relation to the other—e.g. postcolonial feminism as a critique of liberal feminism—and in conversation with the others.
- Each approach has different historical origins and developments, and all continue to evolve.

10.6 Conclusion

Feminist International Relations theories have been present in the discipline of International Relations in various forms since its inception (Tickner and True 2018). In its incarnations since the UN Decade for Women, feminist International Relations theories have demonstrated the crucial importance of including women, and theorizing gender, when attempting to make sense of international politics. Feminist International Relations theories draw from a long history of feminist theorizing and actions to make specific claims about the concepts of International Relations—such as security, the economy, war, and trade—as well as its methods of study. Feminist International Relations theories employ a wide range of methodological approaches, but they share a focus on understanding gender as an analytical

category, not simply a descriptive one. In addition, feminist International Relations scholars straightforwardly examine how gender is a relationship of power, one that affects all individuals, institutions, and interactions in international politics. Bringing this to the fore of their research and methods, feminist International Relations scholars demonstrate the difference that gender makes. Looking ahead, like all scholars of international politics, feminist International Relations scholars must continue to do more to include and heed 'the voices of feminist IR theorists who are people of color, disabled, from Indigenous backgrounds, and/or from the global South (as well as those whose first language may not be English or another western European language)' (Weerawardhana 2018: 192).

Questions

1. Name two ways in which the United Nations Decade for Women changed international politics.
2. What methods do feminist International Relations theories draw on to conduct their research?
3. How does the study of gender affect our understandings of the role of women and men in politics?
4. How do theories of power differ among the four different categories of feminist International Relations theories?
5. Which feminist International Relations theory posits that 'gender is doing', and what does this mean?
6. The Revolutionary Association of the Women of Afghanistan (RAWA) is best described as what type of feminist organization: liberal, critical, postcolonial, or poststructural?
7. The Women's International League of Peace and Freedom (WILPF) is best described as what type of feminist organization: liberal, critical, postcolonial, or poststructural?
8. Why is postcolonial feminism concerned with the question of climate change?
9. Would a liberal feminist find a poststructural feminist critique of heterosexuality convincing? Why or why not?
10. In which ways are international feminist theories necessary for the study of international politics?

Visit the online resources to test your understanding by trying the self-test questions.

Further Reading

Ackerly, B. A., **Stern, M.**, and **True, J.** (eds) (2006), *Feminist Methodologies for International Relations* (Cambridge: Cambridge University Press). Introduces a wide variety of feminist methodologies and examples of their use.

Agathangelou, A. M., and **Ling, L. H. M.** (2009), *Transforming World Politics: From Empire to Multiple Worlds* (London: Routledge). A stimulating theoretical and empirical discussion of the impact of imperialism on world politics.

Al-Ali, N. S., and **Pratt, N. C.** (2010), *What Kind of Liberation?: Women and the Occupation of Iraq* (Berkeley, CA: University of California Press). An informed critique of the United States' claim to liberate the women of Iraq.

Alexander, M. J., and **Mohanty, C. T.** (1997), *Feminist Genealogies, Colonial Legacies, Democratic Futures* (New York: Routledge). A feminist classic and a continuation of the discussion of colonialism and feminist practices and theories.

Bhambra, G. K., **Bouka, Y.**, **Persaud, R. B.**, **Rutazlbwa, O. U.**, **Thakur, V.**, **Bell, D.**, **Smith, K.**, **Haastrup, T.**, and **Adem, S.** (2020), 'Why is Mainstream International Relations Blind to Racism and Colonialism?', *Foreign Policy*, 3 July, https://foreignpolicy.com/2020/07/03/why-is-mainstream-international-relations-ir-blind-to-racism-colonialism/ A sharp review of the failures of the field to confront historical and contemporary injustices of racism and colonialism.

Biswas, S., and **Nair, S.** (2010), *International Relations and States of Exception: Margins, Peripheries, and Excluded Bodies* (London: Routledge). An analysis of contemporary international relations discipline and practice, with specific regard to marginalized and excluded peoples and subjects.

Jauhola, M. (2013), *Post-tsunami Reconstruction in Indonesia: Negotiating Normativity through Gender Mainstreaming Initiatives in Aceh* (London: Routledge). A critical, postcolonial feminist examination of institutions and redevelopment in Indonesia.

Runyon, A. S. (ed.) (2018), 'Decolonizing Knowledge in Feminist World Politics', *International Feminist Journal of Politics*, 20(1): 3–8. A survey of scholarship on feminism and decolonization.

Tickner, J. A. (2014), *A Feminist Voyage through International Relations* (New York: Oxford University Press). An overview of the work of one of the most influential feminist International Relations theorists, with old and new writings over the course of her career.

Visit the online resources to access the latest updates in the field of International Relations.

Chapter 11

Postcolonial and decolonial approaches

MEERA SABARATNAM

Framing Questions

- What are the most important features of world politics according to postcolonial and decolonial approaches?

- How do postcolonial and decolonial scholars approach the study of international relations?

- Is it possible to decolonize world politics?

Reader's Guide

This chapter focuses on postcolonial and decolonial approaches to studying world politics, arguing that these are multilayered and diverse. These do not constitute a single 'theory' of the international but rather a set of orientations to show how the world works and how we should think about it. The chapter begins by separating some different elements involved in theorizing the world, and how postcolonial and decolonial approaches look at them. These include questions of **epistemology** (how we know things), **ontology** (what we know), and norms/ethics (what values are important to us). It goes on to examine the historical context in which postcolonial and decolonial approaches arose, showing that there was a dynamic relationship between political struggles for decolonization and the development of different intellectual arguments. It examines where postcolonial and decolonial approaches have emerged and where they depart from each other in terms of analysis and focus. Having traced these traditions through the twentieth century, the chapter examines the key concepts used in postcolonial and decolonial thought across different disciplines, before looking at their impact on the field of International Relations (IR). Within IR, postcolonial and decolonial approaches have examined the forms of hierarchy that characterize the world, as well as the ways in which they are discussed. The chapter also explores the similarities and differences between these approaches and other theories in the field of IR. Finally, the chapter contemplates the ongoing popularity of postcolonial and decolonial approaches in the present day.

🎧 Visit the online resources to access an interactive timeline of how the discipline of International Relations has evolved.

11.1 Introduction

Postcolonialism is one of the fastest growing areas of research in International Relations. It begins with the insight that the modern world has been deeply shaped by experiences of **empire** and **colonialism**, particularly as conducted by European countries over the last five centuries. It says that our theories of international relations and accounts of world order need to deal with this issue directly, and also asks why the majority of them fail to do so. Postcolonial and decolonial approaches to the field are therefore seen as forms of **critical theory** because they challenge the very foundations of the field. However, these approaches also seek to develop their own alternative ways of theorizing the world.

In postcolonial and decolonial approaches, special attention is paid to the history, ideas, and practice of **decolonization** around the world. Decolonization usually refers to the processes of formal colonial and imperial withdrawal from many countries in Asia, Africa, the Caribbean, and South America, especially in the twentieth century. As a result of decolonization struggles and **processes**, the number of states recognized in the **international** system increased from around 70 in 1945 to more than 190 in 2018. These struggles involved the mobilization of huge numbers of people, the development of intellectual critiques of empire and colonialism, and often armed struggles against imperial rule where colonial powers attempted to maintain their control.

In IR, postcolonial and decolonial approaches interrogate the claims of existing theoretical approaches such as liberalism and realism (**see Chs 7 and 9**), often arguing that these are flawed because they are built on faulty premises, such as the assumption of international **anarchy** or that sovereign states are all essentially alike. These theories obscure the role of empire and colonialism in producing patterns in international order. Postcolonial and decolonial approaches also note that virtually all other recent approaches to IR have left out questions of race and racism from their analysis (**see Ch. 18**). Finally, they argue that these theories are built on very narrow philosophical grounds, which use a specific tradition of Western philosophy as a universal template for thinking through questions of being, society, and ethics.

By bringing questions of empire, colonialism, and race back into the study of world politics, postcolonial and decolonial approaches present alternative accounts of many of the thematic issues in IR presented in this book, such as globalization, war, sovereignty, trade, international law, weapons control, gender, security, environmental crises, development, and labour. These alternative accounts trace the ways in which imperial hierarchies continue to orient identities, policies, and actions in these fields, examine the kinds of resistance that they encounter, and imagine alternative ways of thinking about these issues.

11.2 What are postcolonial and decolonial approaches?

Like social constructivism (**see Ch. 13**) or feminism (**see Ch. 10**), postcolonial and decolonial approaches in IR and other social sciences should be understood as a way of thinking about the world rather than a single theory of how the world works. These approaches draw their influences from a range of sources, including anti-colonial thought from around the world, as well as research in the fields of history, philosophy, education, literary theory, anthropology, and political economy. The variety of influences on the field also means that there are considerable differences among these approaches. However, they can be understood as being united by three levels of theoretical engagement—epistemological, ontological, and **normative**.

Postcolonial and decolonial approaches share a concern with the ways we generate knowledge about the world—our epistemologies. Like many social theories, they reject the assumption that knowledge is ever objective or neutral. They argue that the way that many people know and represent the world depends on hierarchies established by colonial attitudes, and the perspectives of the colonially or racially privileged. Consider, for example, the language used to describe people living in countries that are not their countries of birth; for Westerners living in formerly colonized countries, Westerners often use the term 'expats', but for people from formerly colonized countries moving into the West, they use the term 'immigrants'. The use

of these and similar terms means that the orientation towards and treatment of particular groups is very different depending on their position in the hierarchy. Some postcolonial and decolonial approaches identify these epistemological habits as deeply rooted in the racialized and supremacist assumptions of influential Western philosophers such as Kant and Hegel, who saw white Europe as the pinnacle of humanity, and non-white peoples as backward or uncivilized (**see Box 7.2**).

By contrast, postcolonial and decolonial approaches have emphasized the importance of seeing and knowing the world from the perspectives and worldviews (that is, the epistemologies) of those who are disempowered or dispossessed by imperial and racial hierarchies. However, there are some differences between postcolonial and decolonial approaches. Postcolonial approaches have emphasized the importance of **subaltern** perspectives (**see Section 11.4**) as a site for thinking through relations of power. These can include criticisms rendered back in the language of the colonial power—for example, the use of Christianity to criticize slavery in the Americas. In decolonial approaches, more emphasis is put on retrieving **indigenous** epistemologies and **cosmologies** with which to think about relations among humans, and often non-humans.

Postcolonial and decolonial approaches also take issue with the ontological assumptions of conventional social science and IR—that is, *what* it is that is being studied, *who* is being studied, and more generally *what* the world consists of. Since 1945, IR has understood itself as being concerned with sovereign states, focusing mostly on Western great powers and the relations between them. It has sought to devise theories that explain these relations, specifically where they result either in forms of conflict or cooperation. Postcolonial and decolonial approaches, however, note that the histories they use and the cases they pay attention to miss out the experiences of most of the world's peoples and polities, which are located outside the West. They also miss out the experiences of empire and colonialism in the shaping of Western international histories themselves. For postcolonial and decolonial approaches, this means that conventional IR cannot fully explain or understand world politics. Decolonial approaches engage the idea of '**modernity/coloniality**' (**see Section 11.4**) as a way of talking about how the modern world is fundamentally structured by colonial hierarchy.

This ontological shift causes a re-examination of knowledge in IR. For example, the conflict known as the First World War (1914–18) is a very important reference point in the conventional story of IR. It is understood to be the point at which the 'Long Peace' of the nineteenth century broke down, the point at which the **balance of power** was being tested, a point at which states became averse to violence, and the point at which they established the principle of national self-determination. It is sometimes called the 'graveyard of empires', referring to the break-up of the Ottoman and Austro-Hungarian empires. However, the conventional story treats the key players (Britain, France, Germany, and the United States) as themselves nation-states rather than empires. Yet the protection or assertion of imperial territorial claims was a major source of competition between them, meaning that fighting also took place across Africa, Asia, and the Pacific, and heavily involved troops from those areas fighting for imperial powers. The principle of national self-determination espoused by US President Woodrow Wilson was only really intended for application in Eastern Europe, leading to the violent repression of anti-colonial protests in India and Ireland by Britain immediately following the war. The break-up of the Ottoman Empire also directly facilitated British and French colonial control of the Middle East and the establishment of new territorial borders to regulate their spheres of influence. For postcolonial and decolonial approaches, then, colonialism and **imperialism** are crucial ontological foundations for understanding world politics. Moreover, it becomes impossible to disentangle the 'West' from the 'non-West' in terms of thinking about world history because of imperial and colonial experience (**see Case Study 11.1**).

These considerations are also connected to the normative or ethical foundations for world politics. Postcolonial and decolonial approaches have tended to understand the attitudes, practices, and structures supporting Western supremacy in the world as unequal, racist, and dehumanizing. This is because they tend to elevate Western states and peoples as being fundamentally more important, historically significant, and worthy of attention than non-Westerners. They often lead to the consequences of producing attitudes of superiority, entitlement, and indifference towards the non-West. They also produce what many see as hypocritical attitudes towards the non-West.

For example, in the field of economics, it is understood that the ways in which the West became wealthier are now effectively banned by international agreements and treaties. Some of these are seen to be morally appropriate, such as agreements against the use of enslaved

Case Study 11.1 Imperial wars after decolonization? Rethinking Vietnam

Air Force helicopters in the Vietnam War
© LOU Collection / Alamy Stock Photo

Postcolonial approaches to international relations often highlight the continuities between ideas and practices during and after colonial rule. One of the areas in which they highlight continuities is in the practice of imperial wars waged by Western powers in smaller states in the Global South, even after 'independence'.

During the height of European imperialism, it was common for imperial and colonial powers to use military force to achieve dominance or control of territories and people around the world, such as in the wars against indigenous peoples in North America, the Opium Wars in China, and the 'Scramble for Africa' (**see Case Study 3.2**).

Imperial wars had several key characteristics. They were *expansionist*, because they sought to extend the power and influence of imperial states into new spaces or maintain recent gains. They were often *asymmetric* in terms of the more destructive military technologies usually available to the imperial powers, such as naval bombardment, machine guns, and air power. They were often *population-centric*, targeting not just control of land but aiming for the domination, terror, and disciplining of the people within it. Finally, while these wars often used troops and commanders from Europe, they were also often fought by locally hired proxies or imperial forces brought from elsewhere, and depended on 'friendly' local partners who would maintain imperial interests.

Until recently, conventional approaches to IR did not usually count these wars as part of the record of 'inter-state' wars, which are recorded in databases such as the Correlates of War project, because many of the political formations involved were not recognized as 'states' (with the exception of China, for example). Imperial wars in this sense are explicitly excluded from the picture by influential scholars such as Kenneth Waltz (1979). More recent wars in Vietnam and Afghanistan were seen by conventional scholars as part of US national security strategies during the cold war and the 'war on terror', respectively.

However, by looking at the historical record of intervention in these spaces and reflecting on the kinds of practices that this warfare involves, postcolonial approaches highlight their characteristically imperial nature. The Vietnamese liberation movement, for example, had declared independence in 1945 at the end of the Second World War, but continued to fight, first against French colonialism (with American and British backing) until 1954, at which point Vietnam was temporarily partitioned, and then against the US and the US-installed South Vietnamese government from 1955 until 1975, when American forces finally withdrew and Vietnam was reunified. The war killed over 2 million people, including a high number of civilians. In terms of its expansionist, asymmetric, population-centric, and even proxy-based character, many have understood this as an imperial war based on the attempted maintenance of Western influence and interests in the region.

Historians have also traced the sharing and circulation of military counter-insurgency strategies developed by colonial French strategists in Algeria and Indochina (which drew on techniques used against Native Americans in earlier periods) into British practices in Malaya and Kenya, and forward to the American-led 'war on terror' in Afghanistan, Iraq, and elsewhere (Khalili 2012). They note that in each of these cases, liberal values, civilization, and security were invoked as justifications for imperial violence.

Question 1: What are the key features of imperial wars?

Question 2: Are imperial wars a legitimate response to a perceived national security threat?

labour and colonial territorial expansion. However, it is argued that the West also became rich through the assertion of control over markets and state financial and legal support for particular sectors, which poorer countries are not permitted to do under contemporary development regimes. This has been called 'kicking away the ladder' by economist Ha-Joon Chang (2002), because it deprives poorer countries of the same opportunities for economic growth. Moreover, the West continues to enforce unfair trade and taxation rules that benefit their own economies at the expense of poorer

producers and governments (**see Ch. 28**). Given the role of Western imperialism in shaping the economic structures that govern the world economy today, many argue that there are strong moral obligations on the West to make **reparations** for the effects these have had, particularly towards the descendants of formerly enslaved people.

🎥 Watch the video on the online resources to see the author discussing 'What are postcolonial and decolonial approaches?'

Key Points

- Postcolonial and decolonial approaches are a way of thinking about the world rather than a rigid theory.
- The approaches include insights about how we think about and know the world (epistemology), what we study (ontology), and our ethical or normative responsibilities.
- Postcolonial and decolonial approaches seek to understand things from the perspectives of the colonized/formerly colonized and to challenge the ways that such people are often represented in mainstream approaches.

- They seek to think about world politics by keeping imperialism and colonialism in view as a structure of power which influences and shapes many other forms of power in the world, such as sovereignty.
- They challenge the West in terms of its moral responsibility for inequalities in the world today, arguing that the West is often hypocritical and dehumanizing because it fails to recognize the bases for its own wealth and power, which are rooted in domination over and exploitation of people and resources around the world.

11.3   Where did postcolonial and decolonial ideas come from?

Postcolonial and decolonial ideas are inspired by the history and practice of decolonization. They share many common historical reference points, but the differences between them are also shaped by different geographic and philosophical locations. Whereas postcolonial approaches have been commonly associated with thinkers of Asian and African descent, decolonial approaches have been principally cultivated by Latin American thinkers. We will consider the common historical roots of the two approaches before looking at the differences between them.

An important foundation is a shared understanding of the history of Western empires. Many Western countries controlled and dominated other parts of the world, beginning with the Spanish conquest and occupation of the Americas in the sixteenth century, continuing through the Dutch occupations around the Indian Ocean, and reaching a high point in the British and French empires of the nineteenth and twentieth centuries, which claimed territorial sovereignty over large sections of Asia and Africa (see **Fig. 11.1**). At its height, the British Empire is said to have controlled over a quarter of the world's land area. Empires engaged in many different forms of control and transformation, usually based on their ability to militarily subdue or co-opt the rulers of the area. However, sometimes colonial control also involve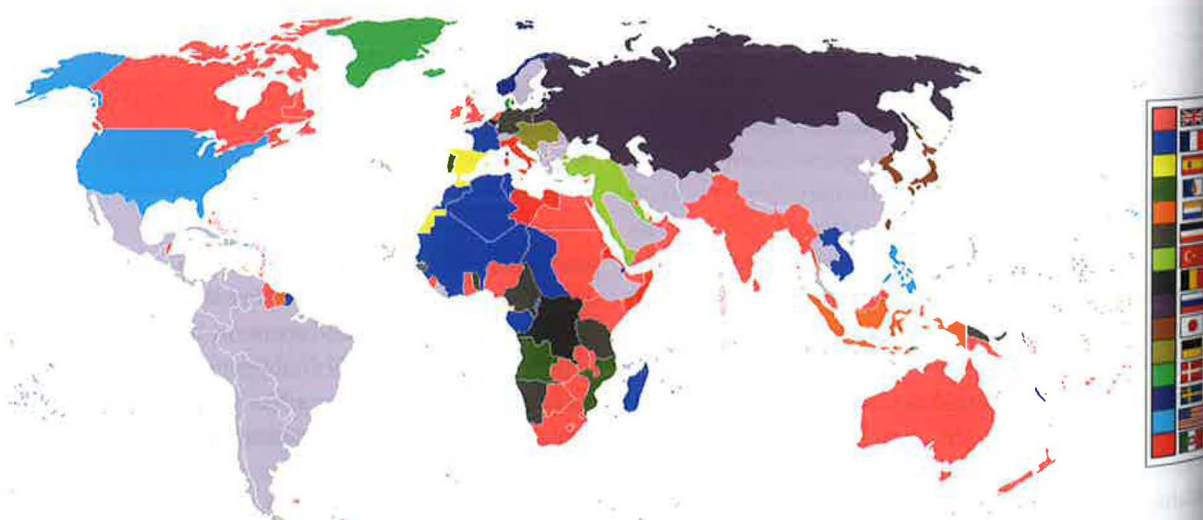d forms of extensive land dispossession and genocidal violence against the indigenous peoples, as in the Americas and Australasia. While there have been other powerful empires in world history, such as in Japan, China, Russia, Iran, and Turkey, their influence has often been curtailed and overwritten by Western influence in recent centuries.

Whatever kind of imperial or colonial control was exercised by European powers, however, there were a number of common patterns to these practices (see **Box 11.1**). Politically, they forced a formal recognition of imperial rule in the area, for instance through declaring loyalty to a European monarch. Economically, they often forced indigenous or imported enslaved peoples to work and produce mostly for imperial markets, for little or no reward. They also extracted raw materials and established trade monopolies on key imports and exports. Culturally, they promoted and imposed their own languages, laws, and often religions. Socially, they often invented, appropriated, or reinforced racial hierarchies, tribal divisions, and gender norms among people in order to divide and manage them.

Resistance to this system of control could be found in multiple places, right from the beginning of imperial practices, but then was particularly facilitated by the improved transport and communication infrastructures of the late nineteenth and twentieth centuries (see **Box 11.2**). From the earliest times, many ordinary people subjected to enslavement and/or colonial rule simply ran away, either by temporarily evading the imperial officials or through establishing communities beyond their reach, with their own cultures and economies. These low-profile zones of independence and autonomy became important in facilitating wider forms of resistance.

Others rejected their unequal treatment through asserting themselves politically and militarily, ultimately demanding independence from colonial powers. A key episode here was the Haitian Revolution starting in 1791, in which the currently and formerly enslaved ousted French masters and troops, declaring themselves free and slavery abolished (see **Ch. 18**). In Haiti, as in the Indian independence movement over the nineteenth and twentieth centuries, there was simultaneously an appropriation of 'Western' ideals (such as the Rights of Man, national self-determination, and democracy) alongside the retention/cultivation of alternative religious, cultural, and political standpoints (such as those rooted in Voodoo or Hindu asceticism) in the search for independence and freedom. Transnational forms of identification were also cultivated and celebrated as part

Figure 11.1   Map of empires in 1914
© Andrew0921/Wikimedia Commons, Distributed under the terms of the Creative Commons Attribution 3.0 Unported (CC BY 3.0): https://creativecommons.org/licenses/by/3.0/deed.en.

of the resistance to the West, including Pan-Africanism and Pan-Arabism. Their legacies are now present in the African Union and the Arab League. Violent military and political struggles for independence continued well after the Second World War, particularly in French and British colonies such as Indochina, Malaya, Kenya, and Algeria (see **Case Study 11.1**). These struggles produced

Box 11.2 Selected instances of anti-colonial revolt

1791–1804	Haitian Revolution
1798	Irish Rebellion
1808–33	Spanish–American wars of independence
1857	Indian Revolt
1881–99	Mahdi Rebellion
1893	Franco-Siamese War
1896	Battle of Adwa
1899	Philippine Insurgency
1899–1901	Boxer Rebellion
1915	Chilembwe Uprising
1916	Easter Rising
1920-2	Indian Non-Cooperation Movement
1929	Aba Women's Riots
1946–54	First Indochina War
1952–64	Mau Mau Rebellion
1954–62	Algerian War of Independence

famous intellectuals and leaders such as Frantz Fanon (1925–1961) and Ho Chi Minh (1890–1969).

Anti-colonial movements also contributed to and were influenced by Marxist critiques of imperialism and **capitalism**, which were associated with left-wing movements around the world. Although Marx and Engels themselves considered India backward and did not accord the 1857 Rebellion much historical importance, non-white thinkers on the left such as W. E. B. Du Bois, C. L. R. James, and M. N. Roy saw the development of global capitalism as fundamentally dependent on colonial structures. Such views were shared by some European leftists such as Rosa Luxemburg, and the climate of anti-imperial and anti-capitalist thought was also cultivated among Chinese thinkers such as Liang Qichao. Many intellectuals who became prominent in the anti-colonial movements of the twentieth century also studied, trained, and travelled outside their own countries, often in the metropole and sometimes extensively, sharing ideas with other anti-imperial and anti-colonial movements. Not only were critiques of colonial capitalism shared, but also strategies of worker organization and strikes, mass non-cooperation, and monopoly breaking became part of the core repertoire of anti-colonial and anti-imperial resistance.

During and after formal political independence, a common **Third World** identity took shape in different international forums, such as the **Bandung Conference**

of 1955 and the **Havana Tricontinental Conference** of 1966. In these spaces, Asian, African, and Latin American leaders came together to discuss their mutual concerns, which included ongoing forms of racial discrimination and imperial control in the world economy. The United Nations (UN) also became a space for Global South collaboration, despite its initial design as a vehicle for continuing imperial control (Mazower 2009). For example, the United Nations Conference on Trade and Development (UNCTAD) was established in 1964 and led by Raúl Prebisch, an Argentinian economist who had contributed to the development of **dependency theory**, which explained why formerly colonized countries remained relatively poor and in many cases got poorer.

In addition, universities in formerly colonized countries often became an important space where anti-colonial and postcolonial thought flourished. The University of Dar-es-Salaam in Tanzania was associated with the ongoing fight for southern African liberation, resistance to **apartheid** in South Africa, and postcolonial struggles in the Caribbean. In India, the University of Delhi was home to a number of leftist historians who developed a form of postcolonial historiography known as Subaltern Studies, and in the United States a number of exiled and diasporic intellectuals continued to write about imperial rule, culture, and governance.

Simultaneously, in Latin America a range of interconnected intellectual projects associated with liberation were growing, including **liberation theology**, radical **pedagogies**, and the recovery of indigenous philosophies. These were historically contextualized by the ongoing problems of global dependency as well as the emergence of authoritarian governments in Latin America and the repression of different groups. Key intellectual figures of this time included Enrique Dussel and Rodolfo Kusch, who drew historical critique and philosophical dialogue with European thinkers together with indigenous and popular forms of political resistance.

In Western scholarship, the field which became known as 'postcolonial studies' evolved in the 1980s and 1990s, in dialogue with debates within history, philosophy, and literature. Famous thinkers in these circles included Ranajit Guha, Edward Said, Homi Bhabha, and Gayatri Spivak. In the years that followed, writers from Latin America such as Aníbal Quijano and María Lugones developed 'decolonial' thinking, which functioned as a sympathetic critique both of dependency theory and of the cultural emphasis in postcolonial studies.

Key Points

- Postcolonial and decolonial approaches are inspired by the history and practice of decolonization struggles, which entailed intellectual, political, and military strategies against colonial empires.

- Colonial and imperial rule had a number of common political, economic, cultural, and social features, most of which were functionally related to the control of territories and people, despite differences in historical context.

- Resistance to imperialism and colonialism took place at many historical moments, but picked up organizational and political momentum in the early twentieth century due to improved infrastructures and mobility as well as the growth of anti-colonial ideas.

- Anti-colonial intellectuals had many transnational influences and connections which shaped their ideas, political strategies, and material capabilities for resistance. Many were linked to communist organizations in the USSR and China.

- A Third World identity and way of thinking continued after formal political independence, consolidated at conferences such as the Bandung Conference in Indonesia and the Tricontinental Conference in Havana.

- Postcolonial and decolonial approaches are strongly influenced by this history of transnational anti-colonial activity.

11.4 What are the main ideas underpinning postcolonial and decolonial thought?

In line with the idea that postcolonial and decolonial approaches are a way of thinking about the world rather than a rigid theory, they are guided by a number of key concepts and ideas. In this section, we will examine some of the most influential ideas in the tradition and the thinkers they have been associated with. Although not necessarily originating in the field of IR, they clearly have insights into the functioning of world politics. We will see in **Section 11.5** how they have been used in more recent IR scholarship.

11.4.1 Colonialism as a system of (total) violence

Frantz Fanon argued that, as a system, colonialism represents a totalizing form of violence. This is because it operates not only at physical, economic, and political levels, putting colonizers and settlers above 'natives' in the colony, but also involves their psychological, social, and cultural destruction through forms of racism and linguistic/cultural imperialism. Fanon, a trained psychiatrist, wrote about the alienating and dehumanizing character of racism in French colonial metropolitan culture in *Black Skin, White Masks* (Fanon 2008 [1954]), as well as the nature of the struggle against colonialism based on experiences in Algeria in *The Wretched of the Earth* (Fanon 2001 [1965]). In Fanon's view, there was no possibility of political reconciliation or accommodation with colonialism since it was founded on this

fundamental negation of the humanity and rights of the colonized. This situation meant that the colonized needed to completely overturn colonialism, ultimately through forms of violent resistance which could form the basis for a more equal, fraternal footing in the future.

11.4.2 Neo-colonialism as an economic and political structure

The term '**neo-colonialism**' was coined by Kwame Nkrumah, an anti-colonial activist and the first leader of independent Ghana, in the early 1960s. He published *Neo-colonialism: The Last Stage of Imperialism* in 1965. According to Nkrumah (1965), 'The essence of neo-colonialism is that the State which is subject to it is, in theory, independent and has all the outward trappings of international sovereignty. In reality its economic system and thus its political policy is directed from outside.' Nkrumah was specifically referring to situations (often former French colonies) where, despite independence, foreign military troops had stayed in the country, where foreign investors or corporations owned land, industries, and mining concessions, and where policies on a range of domestic and international affairs were being directed by external forces—typically the former colonial power, but also often superpower interference. Neo-colonialism was seen as a key driver of violence and economic impoverishment in newly independent countries.

11.4.3 Orientalism and Otherness as modes of representation

The word 'Orientalists' at one time referred to scholars who studied Eastern cultures, religions, and languages in Western universities. In Edward Said's famous work, *Orientalism* (Said 2003 [1978]), however, he argued that **Orientalism** was also a way of imagining and representing the world in ways that justified and supported imperialism. This meant depicting Europeans as rational, strong, enlightened, and liberal, in contrast to non-Europeans who were shown as barbaric, effeminate, weak, dangerous, and irrational Others. He showed these romanticizing attitudes and forms of representation to be widespread in English literature of the nineteenth and early twentieth centuries. Valentin Mudimbe (1988) has made a related argument about the imagination of 'Africa' through relations of Otherness in Western thinking. For both scholars, the ways in which we represent the non-Western Other is a significant factor in justifying imperial control and paternalistic practices towards them.

11.4.4 Eurocentrism as an intellectual habit/practice

'Eurocentrism' can be understood as the widespread tendency to treat Europe as the primary subject of and reference point for world history, civilization, and/or humanity. The use of the term was popularized by a number of critical thinkers associated with dependency theory, such as Samir Amin and Immanuel Wallerstein, although it is also associated with postcolonial historians such as Dipesh Chakrabarty. Eurocentric thinking, for example in economics or history, might involve the assumption that all societies will or should evolve along the lines of European ones, or a comparison of other societies' failures in relation to a European 'universal' standard. It also generally entails the ignoring of histories, cultures, and knowledges originating from outside Europe in the discussion of world affairs. In many cases, this is because such knowledges and cultures are represented as stagnant or non-dynamic.

11.4.5 Subaltern as the social position of the colonized

The term 'subaltern' is often connected with the thought of Sardinian Marxist thinker Antonio Gramsci (1891–1937). Gramsci reflected on how power was exercised not just through violence but also through culture and ideology in society. He described the forms of ideological and cultural domination exercised by the ruling classes as

'hegemony', and those groups excluded from these forms of representation as 'subaltern'. In researching the colonial histories of India's peasantry, the Subaltern Studies collective established by Ranajit Guha used this framework to analyse the political, economic, and cultural exclusion of peasants from imperial hegemonic structures of law, rights, languages, and property. However, due to the fact that such groups were subaltern, they were not well represented in the historical record, posing methodological challenges which needed to be overcome. Gayatri Spivak's (1988) cautious critique of attempting to write such histories drew attention to the intersecting roles of colonialism and **patriarchy** in rendering Indian peasant women doubly colonized/subaltern.

11.4.6 Modernity/coloniality as overarching historical/philosophical structure

'Modernity/coloniality' is a term developed among Latin American thinkers, principally Enrique Dussel, Aníbal Quijano, Walter Mignolo, and María Lugones. It is a central idea in decolonial theory. Contrary to the conventional view of modernity as progressive, equalizing, and democratic, it says that the philosophical and political project of modernity is foundationally premised on coloniality—that is, a racialized, hierarchical binary that empowers people and ideas seen as 'modern' over those seen as 'non-modern'. Such a hierarchical structure is seen to animate modern global processes such as capitalism, science, state-building, and development, and has been expanding since the Spanish conquest of the Americas in 1492. As argued by Lugones (2007), it has also shaped a particular form of colonial patriarchy and remade gender relations along colonial lines. This 'dark' side of modernity is rooted deeply in the conceptions of man and knowledge that underpin European philosophy. This structure of modernity/coloniality monopolizes and universalizes its own ways of thinking, erasing and exploiting others through forms of modern power.

11.4.7 'Border thinking' as a way to think decolonially

The term 'border thinking' was coined by Chicana thinker Gloria Anzaldúa (2012 [1987]) and is associated with Walter Mignolo. It can be understood as thinking from the 'underside' of modernity. It means to think with the perspectives of people who are marginalized, undervalued, or excluded by the ideals of modernity—for example, indigenous peoples, non-white migrants,

and women. This kind of thinking is subversive because it rejects the authority of European 'reason' and introduces the possibility of alternatives to colonial modernity. Ramón Grosfoguel offers the Zapatista philosophy as an example of border thinking. The Zapatista movement has combined indigenous Mexican ideas about land and spirituality with leftist critiques of capitalism and the state in their project to create and defend an alternative way of life in Chiapas, Mexico. The concept of border thinking resonates strongly with longer-established historical practices of resistance to colonial ideas and systems of rule.

11.4.8 Decolonization as practices to overturn colonialism and coloniality

The term 'decolonization' has been experiencing something of a renaissance in recent years. In the mid-twentieth century, during the widespread struggles

against colonialism, 'decolonization' usually referred to processes of gaining political independence in the framework of national self-determination. However, it was also used by intellectuals such as Fanon, Ngũgĩ wa Thiong'o, and Ashis Nandy to refer to the psychological and intellectual struggle against colonialism through the retrieval of indigenous agency, language, and spirituality—that is, to 'decolonize the mind'. More recently, 'decolonization' has been used to refer to a range of critical projects across many social, cultural, and scientific fields that seek to interrogate and overturn the legacies of colonialism, such as decolonizing the curriculum (**see Opposing Opinions 11.1**). This usage of 'decolonization' has attracted some criticism from indigenous scholars in settler-colonial societies (**see Box 11.3**), such as Eve Tuck and K. Wayne Yang (2012), who argue that its principal meaning in terms of regaining territorial sovereignty is being diluted and therefore its political potential is being neutralized or co-opted.

Opposing Opinions 11.1   Universities can be decolonized

For

Universities have changed in line with the times, with lots more women, working-class students, and students of colour. This means that some of the barriers of colonial prejudice keeping various students out of the classroom are being broken down. Different types of students can expand the horizons of knowledge that universities provide, meaning that they can become less tied to the imperial attitudes of the West.

Thanks to globalization, there are more resources available in terms of knowledge, resources, and perspectives available in different subjects. One of the factors limiting the kinds of knowledge taught by universities has been access to sources of knowledge from different groups, in different languages, and made in different media. Due to the revolution in communication, knowledge production has become more global and more democratic. 'Decolonizing' the university must mean drawing on these wider perspectives and sources of information to understand different issues.

Education has historically functioned as a tool of liberation. Many activists involved in decolonization struggles and other struggles for rights have found that universities across the world are spaces to develop their ideas, create social networks, and produce writing of their own. The university is therefore not a static institution, but rather becomes whatever its students and staff make of it.

Against

Universities tend to promote elite knowledges and worldviews. Precisely because the West has dominated the world, its universities have promoted forms of knowledge and worldviews that reinforce this domination. Many universities in the Global South have sought to emulate, rather than to challenge, this organization of knowledge.

The domination of the English language and expensive publishing formats limits access. As long as English is the dominant language for academic research, there will be inequalities in terms of access to knowledge. The globalization of academic publishing has not meant an end to imperial hierarchies either—corporate publishers located in the West dominate the market and set the agenda for universities around the world. They control access to the most prestigious knowledge in order to extract income from it.

Most people across the world regard university education as a means to help them participate in a capitalist, Western-dominated world economy. For most people, surviving in the world they encounter is a more important priority than trying to change it. This means that it is more likely that the university education they seek will be about training them to fit in with established fields of knowledge or ways of doing things rather than radically changing them.

1. Do you agree that today we have more democratic forms of knowledge-making and knowledge-sharing than in the past?

2. Is the predominance of the English language a barrier to decolonization?

3. Are more people interested in trying to survive in the world than in trying to change it?

Visit the online resources to discover pointers to help you tackle these questions.

Key Points

- Postcolonial and decolonial approaches have developed their own conceptual apparatus for understanding the world through terms such as 'neo-colonialism', 'Orientalism', 'Eurocentrism', 'modernity/coloniality', and others. These terms have specific meanings when used by writers in this context, but are sometimes used in a more general way.

- Postcolonial and decolonial approaches emerge in slightly different geographical and historical locations, with postcolonial approaches mostly associated with thinkers from regions formerly colonized by Britain or France such as Asia and Africa, and decolonial approaches associated with

thinkers from regions formerly colonized by Spain or Portugal such as Central and South America.

- There are some different emphases between postcolonial and decolonial approaches in terms of vocabulary and thinking, such as the emphasis in decolonial thought on the cosmologies of indigenous peoples.

- Decolonization is a contested term with multiple meanings, but it is a term increasingly applied to activity in different spheres such as art, education, and culture, that seeks to dislodge the centrality of Western epistemologies and viewpoints.

Box 11.3 Settler colonialism

'Settler colonialism' refers to forms of colonialism which involve eliminating 'native' society and establishing other populations and their laws as sovereign in a territory. This type of colonialism has been most recently associated with European settlement in North and South America, North Africa, Southern Africa, Australia, New Zealand, and Palestine. In these instances, European empires acquired land through a combination of force and agreements (many of which are contested/forgotten), and set about establishing control of entire territories or continents. They often did so by claiming that the land was unoccupied ('terra nullius'), and by encouraging mass immigration from Europe. 'Natives' were initially displaced from strategic rivers, coasts, and farming land and often contained in poorly resourced 'reservations'. Many died either from direct,

sometimes genocidal, violence or from famine and disease incurred by displacement (such as in the US). Native rulers, languages, and laws were ignored or discouraged, and in many territories (such as Canada and Australia) native children were forcibly removed from their families and sent to settler families or boarding schools in order to make them 'assimilate' to settler culture. Patrick Wolfe (2006) has famously argued that settler colonialism is a 'structure' rather than an event. Many indigenous groups continue to press for their rights, either as granted to them in particular treaties (such as the Waitangi Treaty in Aotearoa/New Zealand) or for sovereignty that was never officially ceded (such as in Canada and Australia). Some of these dynamics are also key features of the ongoing conflict between Israel and the Palestinians.

11.5 Postcolonial and decolonial approaches to studying world politics

Questions of empire, race, and colonialism were pressing issues in the early twentieth century, when International Relations was being established as a scholarly field. As Robert Vitalis (2000) has shown in political science, there was a distinct subfield of study known as 'Colonial Administration'. The famous International Relations journal *Foreign Affairs* began life as the *Journal of Race Development* in 1900, unusually including contributions from African-American scholars such as W. E. B. Du Bois.

Du Bois's contributions have been overlooked until recently in IR, but he was prominent in his time. In 1902, Du Bois argued that the 'global colour line' was the major problem of the twentieth century. In his analysis, developed over the following years, he argued that one of the main causes for war between European states was competition for control of colonies and imperial possessions, and that this itself was driven by racial

discrimination and a sense of white superiority. For Du Bois (1917), the invention of 'whiteness' as a sense of identity was linked to the emergence of capitalism and democracy in Europe. This had produced a mass of people who wanted to consume different goods and to feel a sense of political pride—imperialism was a solution to both problems for them.

Du Bois's work, and that of others around him such as the Howard School (Vitalis 2015), however, was not retained as part of the canon of IR. For various reasons, not least the chilling political climate associated with the cold war in the West, anti-colonial and postcolonial thinking did not receive much attention on its own terms in the field of IR until the 1990s. At most, people were familiar with dependency theory and conventional accounts of decolonization such as that of Hedley Bull (1984). However, following work in the 1990s by Roxanne Doty (1993), Sankaran Krishna (1993), Siba

Grovogui (1996), and Phillip Darby and A. J. Paolini (1994), postcolonial and decolonial approaches began to flourish in the field from the 2000s onwards.

11.5.1 International relations theory

One major line of attack was on conventional International Relations theory. Scholars such as Krishna (2001) argued that IR theory abstracted too much from reality when it treated states as independent units and only wrote about the Western states. This enabled IR scholarship to depict the nineteenth century as a 'Hundred Years' Peace' in the international system, for example, completely ignoring the dynamics of empire. It also allowed a view of international law

that saw it as part of the civilizing influence of the West (Grovogui 1996). By contrast, viewed from the perspective of colonized peoples, the nineteenth century was anything but peaceful, involving the violent, sometimes genocidal, suppression of resistance to imperial control. Instruments such as international law and trade were not developed because the West was naturally civilizing, but because it was attempting to assert sovereign rule over non-European spaces on sea and land. From this perspective, International Relations theory was part of the problem of imperial violence, allowing Western intellectuals to sanitize and limit their understanding of international order through selective forgetting, especially the forgetting of commitments made by colonizing powers (**see Case Study 11.2**).

Case Study 11.2 Indigenous peoples between the 'domestic' and the 'international'

Anti-pipeline protesters hang protest signs on a blocked train in solidary with the Wet'suwet'en nation
© Puffin's Pictures / Alamy Stock Photo

Our common impression of the modern nation-state in International Relations is of a territorially bounded, fully sovereign entity containing a group of people (i.e. a 'nation') who are citizens of the state, governed by a single set of laws. 'Western' states are often seen to express these norms or expectations most fully.

However, many Western states, including Canada, the United States, Australia, and New Zealand, are 'settler states', meaning that they were built on territories expropriated from indigenous peoples (see Box 11.3). Although the process of colonization violently and negatively impacted the presence of indigenous peoples, they were not fully eliminated, and continue to exist and self-organize within and between settler states (Lightfoot 2021).

For example, the Haudenosaunee Confederacy (known to settlers as the Iroquois) is a political federation of five nations—the Mohawk, Oneida, Onondaga, Cayuga, and Seneca—whose members are located across the borders of the settler states of Canada and the United States, and which dates back to 1142 in some records. Extremely powerful, particularly during the seventeenth and eighteenth centuries, it is widely understood that the structures of shared decision-making and democracy in the Confederacy influenced the drafters of the settler US Constitution.

However, as colonization expanded, the power and land of the Haudenosaunee was challenged both militarily and politically. Nonetheless, various treaties were signed by the settler governments with both the Confederacy and member nations which recognized their sovereignty and their land rights in perpetuity, as well as their rights to pass through territories separated by the settler border. But despite these treaties, the acquisition of indigenous land has continued, albeit in a highly contested way, over the centuries. Indigenous peoples affirm in many areas that territories are 'unceded'—i.e. that their settlement was never legally agreed.

In 2007, after several decades of negotiation, the UN Declaration on the Rights of Indigenous Peoples (UNDRIP) was adopted by the General Assembly. Although the US, Canada, New Zealand, and Australia initially opposed the resolution, they later came to adopt it and in principle incorporate it into law. The Declaration affirms the right of collective self-determination for indigenous people, their land rights, their cultural rights, their rights to custodianship of their children, and so on. Alongside historic treaty rights, indigenous law, and international human rights norms, the Declaration now forms part of the international and national legal infrastructure which is supposed to ensure the rights of indigenous peoples.

Canada has recently attempted a reconciliation process between settlers and indigenous peoples to recognize the violence and dispossession that has attended their relationship over time, such as the forcible enrolment of indigenous children in violent residential schools over more than a century and the disappearance and abuse of indigenous women and girls. However, the Canadian government continues to support fossil fuel and mining companies in their use of indigenous land and water supplies, even though indigenous peoples have highlighted its illegality and severe health and environmental consequences.

Question 1: Should relations between settler colonial states and indigenous peoples be understood as a form of 'international relations'?

Question 2: How do indigenous practices of sovereignty-making change how we understand sovereignty?

Other scholars further developed the idea that Eurocentric or colonial thinking was a constitutive part of Western IR theory, and even forms of 'critical' theory (Gruffydd Jones 2006; Hobson 2012; Sabaratnam 2013). They argued that many theories created a mythologized image of the West (either positive or negative) which was then the only focus of attention in developing the theory. This persistent tendency to look 'inwards', to have a stereotyped understanding of the West, and to ignore the rest of the world (except as areas where the West might project power) meant that IR had a limited understanding of the world. These tendencies sustain a white-racialized positioning in IR theory (Sabaratnam 2020). Many postcolonial and decolonial scholars in IR have suggested alternatives. These include taking an approach to historical development which incorporates non-Western political, economic, and military formations (Bhambra 2007; Zarakol 2010; Phillips and Sharman 2015), studying the thought, perspectives, and practices of people and scholars outside the West (Shilliam 2010, 2015; Tickner and Blaney 2012, 2013; Persaud and Sajed 2018), imagining different geographical starting points for analysis (Ling 2002, 2013; Laffey and Weldes 2008; Acharya 2014b; Niang 2018), and widening our understanding of where 'politics' takes place (Agathangelou and Ling 2009). These different mechanisms can help widen perspectives and historical understandings. The similarities and differences between postcolonial and decolonial approaches compared to other approaches in IR are given in **Table 11.1**.

11.5.2 Alternative takes on mainstream issues

A second aspect of research has been to study specific 'traditional' issues in world politics through postcolonial and decolonial approaches. A significant early work in this vein was Roxanne Doty's book *Imperial Encounters* (1996) on US foreign policy. Most conventional views of US foreign policy in IR at the time were either realist or liberal, with some looking at bureaucratic elements in foreign policy-making. Doty, however, demonstrated, using a form of **discourse analysis**, that aspects of US foreign policy, as well as that of Britain, were enabled by imperial, racialized representations of the Philippines and Kenya. These representations were a critical factor in enabling specific foreign policy options to be pursued. In a related vein, Mark Laffey and Jutta Weldes (2008) examine the Cuban Missile Crisis from the perspectives of its Cuban participants, rather than those of the US and Soviet strategists. Seen in this light, the missile crisis is not a surprising example of nuclear brinksmanship, but rather its causes are seen in the series of attempts made by the US in the 1950s and 1960s to destabilize the Cuban government.

The utility of postcolonial and decolonial approaches to world politics became more pronounced in light of the terrorist attacks in the US on 11 September 2001 and the global war on terror that ensued. Following these attacks, conservative and liberal US intellectuals actively encouraged the US to see itself as a benevolent kind of empire and to embrace the assertion of its power in different spaces. Leftist intellectuals, however, attacked the US for its imperialist policy towards the Middle East, which they considered illegitimate, criticizing the 2003 invasion of Iraq in particular. Postcolonial and decolonial scholars were, however, able to contextualize US policy in a longer historical structure of imperial and colonial power in Iraq and Afghanistan (Gregory 2004; Khalili 2012; Manchanda 2017), demonstrating the significance of those relations to the kinds of decisions made about the region, including the techniques of counter-insurgency (**see Case Study 11.1**).

11.5.3 Retrieving the (formerly) colonized as subjects of IR

A third area of research paid attention to the histories, ideas, and practices of (formerly) colonized peoples around the world. This aimed both to deal with the problem of their neglect in the discipline, as well as to demonstrate the alternative possibilities for politics that could be understood within them. A significant body of decolonial work in this area has been produced by Robbie Shilliam (2006, 2011, 2015; **see Ch. 18**), who examines the political thought and practice of the descendants of enslaved Africans around the world. This examination reveals alternative forms of sovereignty, rights, solidarity, and justice which are attentive to histories of colonial violence and the possibilities of rethinking the 'human'. The work serves as a counterpoint to liberal narratives that see ideas for emancipation, rights, and solidarity as fundamentally Western in their origins and orientations.

Other work in the field has emphasized the ways in which postcolonial/colonized subjects present alternative ways of thinking about international issues (this is similar to 'border thinking'; **see Section 11.4.7**). For example, Rahul Rao (2010) has looked at Third World cosmopolitanisms as a series of creative responses to the twin problems of nationalism and imperialism. For Rao, these thinkers demonstrate that it is possible to address conundrums in international ethics usually posed as an opposition between the domestic and the international (see also Gruffydd Jones 2010; Jabri 2012). More widely, postcolonial and decolonial scholars have thought about how starting with the perspectives and worldviews of the colonized can build alternative forms of theory and structural analysis about world politics (Blaney and Tickner 2017; Sabaratnam 2017).

> **Key Points**
>
> - Colonialism and empire were central to the early discipline of IR, particularly among African-American thinkers such as Du Bois and the Howard School, but were later ignored by the central traditions in the field.
> - The cold war environment meant that criticisms of the West were often suppressed because of a real or imagined relationship with communism, which had a chilling effect on the development of International Relations as a field of study.
> - Postcolonial and decolonial scholarship in international relations has been growing steadily since the 1990s alongside other critical traditions, with an increasing presence of scholars with heritage in the Global South.
> - Postcolonial and decolonial scholarship has challenged mainstream IR theory in terms of its fundamental categories and assumptions, developed alternative readings of particular issue-areas such as war and security, and paid attention to the political thought of (formerly) colonized people as a basis for analysing global order. As such, it offers many alternative perspectives from which to view central problems in the field.

Table 11.1 Similarities and differences between postcolonial and decolonial IR compared to other IR theories

Theory	Similarities	Differences from this theory
Realism	Agree on the self-interested character of elites and states, and the centrality of power	Emphasize system as hierarchical and imperial rather than anarchic and sovereign, and power as much more multifaceted
Liberalism	Agree that cooperation is possible and durable	Emphasize that cooperation is only generally among states considered 'developed'/'civilized' for the purposes of securing their privileges
Marxism	Agree in general that capitalism is a major organizing structure in world politics and that its tendencies are exploitative and immiserating	Emphasize roles of racialization and colonial expansion in determining the character and pattern of exploitation (such as enslavement of Africans, poor conditions for workers in Asia)
Feminism	Agree that patriarchy is a major element in structuring international politics	Emphasize (as many feminists do) that gender intersects with race, class, and nationality in producing structures of power/entitlement
Constructivism	Agree that the world is 'socially constructed' in important ways—particular images produce political possibilities (for example, portrayal of Muslims as violent/irrational)	Emphasize the asymmetric, colonial, and purposive character of these constructions
Poststructuralism	Agree with critique of knowledge and power as being always intertwined, and the idea of meaning as being intertextually produced	Emphasize the material as well as discursive character of oppression, exploitation, and violence, plus the importance of strategic essentialism in advancing critical claims (rather than only deconstruction)

11.6 Decolonization: the struggle continues?

It is an interesting historical fact that the rise of postcolonial and decolonial approaches has continued, and perhaps even grown, several decades after many countries successfully claimed political independence from European empires. This has coincided with the fall of many leaders associated with decolonization struggles, either through death or a political fall from their image as liberator (such as Robert Mugabe in Zimbabwe). It has also coincided with the growth of many countries in the Global South to positions of relative wealth and

power, such as China, India, Brazil, and South Africa. In fact some of these countries are themselves accused of acting in an 'imperial' manner towards others. What do postcolonial and decolonial approaches have to offer in an era of relatively decreasing Western power?

One set of contributions reflects the continued persistence of imperial relations in different aspects of world order. These are readily apparent when examining such diverse issues as the composition and practice of the UN Security Council, the debates about nuclear disarmament, negotiations about the environment, trade, and international law, the militarization of the Middle East, the conditions of aid and development, the debates around Brexit, the resurgence of extreme right-wing views, the conduct of war, and the regimes around migration. For postcolonial and decolonial approaches, in each case the field is structured through the assumptions of Western superiority and rationality developed during the colonial period, and through forms of collaboration among formerly imperial powers.

Moreover, the conceptual tools developed by postcolonial and decolonial approaches may also be critically applied to the behaviour of non-Western governments. For example, farmers' movements and Green movements in Brazil have criticized the alliance between their own governments, foreign governments, multinational corporations, and Western-dominated international organizations for the state of environmental policy and food policy. For these groups, all members of these alliances are complicit in a form of neo-colonial management of land across the world.

Relatedly, an explosion in anti-racist movements and activities across the world has also generated more interest in the global and historical dimensions

of empire and colonialism. Movements such as #RhodesMustFall/#FeesMustFall on South African university campuses and #BlackLivesMatter in the United States have inspired many students across the globe to take issue with the colonial foundations of their education and other forms of racial injustice on campus. The ongoing drowning of thousands of Middle Eastern and African migrants in the Mediterranean at the borders of the European Union has also drawn attention to the double standards at work in the global human rights regime when it comes to the difference between white and non-white lives.

> ### Key Points
>
> - Postcolonial and decolonial approaches have remained popular despite the achievement of political independence, the fall in popularity and stature of anti-colonial leaders, and the rise of non-Western powers such as China, India, and Brazil.
>
> - Postcolonial and decolonial approaches seek to explain many features of the contemporary world order through a consideration of relations of imperialism and colonialism, which they see as persisting in global institutions, international trade, identities in the West, arms control, and other issues.
>
> - Increasingly, decolonization struggles have turned against non-Western governments for their continuation of, or complicity with, forms of colonial development, such as in the struggles over land in Brazil and education in South Africa.
>
> - There are ongoing political struggles which link their objectives to the overturning of imperial and colonial hierarchies, particularly where these relate to the unequal and violent treatment of people who are racialized as non-white in both 'international' and 'domestic' contexts.

11.7 Conclusion

Postcolonial and decolonial approaches consider the study of world politics at many different levels. At the level of theory in IR, they draw attention to the categories that are used, the way that knowledge is constructed, and the histories that are remembered and forgotten. For these approaches, International Relations has been too ready to ignore its imperial origins, the questions of racism and colonialism in the constitution of international order, and the ongoing inequalities that have been produced. Postcolonial and decolonial research has, however, sought to retrieve these and bring about a more globally comprehensive perspective on the foundations of world order.

Historically speaking, postcolonial and decolonial approaches have emerged in a close relationship with the political struggles for decolonization from European rule in the nineteenth and twentieth centuries. Many do not believe that a politically neutral approach to international relations can exist per se, although there can be better and worse understandings of what is going on in the world. Postcolonial and decolonial approaches are generally sympathetic to ethical interests in promoting a more equal world order, or at least one in which colonialism and racism become less powerful.

The key intellectual challenge ahead for postcolonial and decolonial approaches will be to see how the heralded geopolitical shifts in power between West and East affect the behaviour of states and other international actors. Will new powers in the East remember their struggles for decolonization

and make a new set of rules for running the world? Or will they conform to existing imperial patterns of power and domination? Either way, postcolonial and decolonial approaches will have much to offer the understanding of world politics for some time to come.

Questions

1. Where did postcolonial ideas begin?
2. What are the main differences between postcolonial and decolonial approaches?
3. Is there a difference between the ideas that influence political activists involved in decolonization struggles and the academic approaches to decolonization?
4. Is it fair to say that International Relations is a colonial discipline?
5. Is it possible to 'decolonize' International Relations?
6. Who are the main driving forces behind 'decolonizing' the field?
7. Does neo-colonialism present the same ethical problems as formal colonialism?
8. Can we separate the effects of capitalism from the effects of colonialism?
9. 'Decolonization is not a metaphor' (Tuck and Yang 2012). Discuss with reference to education.
10. With which other theories in IR are postcolonial and decolonial approaches most compatible?

Visit the online resources to test your understanding by trying the self-test questions.

Further Reading

Barkawi, T., and **Laffey, M.** (2006), 'The Postcolonial Moment in Security Studies', *Review of International Studies*, 32(2): 329–52. A critical examination of Eurocentric tendencies in mainstream studies of security.

Doty, R. L. (1996), *Imperial Encounters: The Politics of Representation in North–South Relations* (Minneapolis, MN: University of Minnesota Press). An analysis of foreign policy discourses in the US and UK which explores questions of racialization and imperialism.

Du Bois, W. E. B. (1915), 'The African Roots of War', *The Atlantic*, 115(5): 707–14. An early critique of the failure to account for the colonial origins of inter-imperial competition in the First World War.

Fanon, F. (2001 [1965]), *The Wretched of the Earth*, trans. Constance Farrington (London: Penguin). A rousing analytical polemic working through the challenges of decolonization, the problem of violence, and the future to come.

Gruffydd Jones, B. (2006), *Decolonizing International Relations* (Lanham, MD: Rowman & Littlefield). A collection of work from scholars in International Relations examining diverse colonial dynamics in the field and proposing analytic alternatives.

Krishna, S. (2001), 'Race, Amnesia, and the Education of International Relations', *Alternatives: Global, Local, Political*, 26(4): 401–24. An engaged critique of dominant narratives in international relations which brings colonial violence into view.

Lugones, M. (2007), 'Heterosexualism and the Colonial/Modern Gender System', *Hypatia*, 22(1): 186–219. A prominent statement of the relationship between coloniality as a structure and its remaking of gender relations in South America.

Mignolo, W. D. (2011), *The Darker Side of Western Modernity: Global Futures, Decolonial Options* (Durham, NC: Duke University Press). A historical-philosophical critique of modernity as always constituted by coloniality.

Sabaratnam, M. (2017), *Decolonising Intervention: International Statebuilding in Mozambique* (Lanham, MD: Rowman & Littlefield). A critique of Eurocentric debates in critical International Relations and a reconstruction of analysis using decolonizing methods.

Sabaratnam, M. (2020), 'Is IR Theory White? Racialised Subject-Positioning in Three Canonical Texts', *Millennium: Journal of International Studies*, 49(1): 3–31. An examination of foundational International Relations through the lens of critical race theory.

Visit the online resources to access the latest updates in the field of International Relations.

Chapter 12

Poststructuralism

LENE HANSEN

Framing Questions

- Does language matter for international relations?

- Do all states have the same identity?

- Is the state the most important actor in world politics today?

Reader's Guide

This chapter focuses on poststructuralism, one of the international relations perspectives furthest away from the realist and liberal mainstream. Poststructuralists in International Relations (IR) draw on a larger body of philosophical texts known as poststructuralism. They argue that the state stands at the centre of world politics and that we should understand the state as a particular form of political community. This challenges mainstream IR's conception of the state as a rational actor driven by a self-help imperative and relative or absolute gains. Poststructuralism argues that this conception is ahistorical and that it marginalizes non- and trans-state actors, stateless people, and those persecuted by 'their own' states. The central status that the state now has is not inevitable, but rather the result of political and academic practices that reproduce this status. Poststructuralists hold that foreign policies always imply a particular representation of our and others' identities. These identities have no fixed meaning, but are constituted in language. Using the concept of discourse, poststructuralists argue that material 'things' only come to have meaning as they are represented by particular words and images. Poststructuralists also argue that world politics is practised not only by governments and international organizations, but through popular culture including film, video games, and television shows.

Visit the online resources to access an interactive timeline of how the discipline of International Relations has evolved.

12.1 Introduction

Like **constructivism**, poststructuralism became part of International Relations (IR) in the 1980s (**see Ch. 13**). And similar to constructivists, poststructuralists in IR were influenced by social and philosophical theory, which had played a major role in the humanities since the 1970s. Politically, the **second cold war's** domination of the early and mid-1980s impacted poststructuralists, who feared that the two blocs would destroy each other in a nuclear **holocaust** (**see Ch. 4**). Poststructuralists held that the key to the **cold war** lay in the enemy constructions that both East and West promoted. The cold war is now long gone, but poststructuralism is still very much focused on **high politics** (themes high on the foreign policy agenda, such as war, security, and the military), and it maintains a concern with states' constructions of threats and enemies.

Poststructuralists bring a critical perspective to the study of world politics in two important respects. They are critical of the way that most states conduct their foreign policies and how most IR theories tell us to study what states do. Poststructuralists disagree with **realism** (**see Ch. 9**) that we should see the state as a **self-help** actor or as a unit that stays the same through history. Rather, the state is a particular way of understanding **political community**—that is, who we can trust and who we feel we have something in common with (**see Ch. 31**). Likewise, if the **international system** is **anarchic**, it is because states and other actors reproduce this system, not because it is a given, once and for all. Poststructuralism wants us to take seriously what existing policies and theories exclude and marginalize, and it tells us to think critically about how we construct the world. To poststructuralists, there is no objective yardstick that we can use to define threats, dangers, enemies, or underdevelopment. We need to investigate how constructions of the world, and the people and places in it, make particular policies seem natural and therefore legitimate.

12.2 Studying the social world

Because poststructuralism adopts a critical attitude to world politics, it raises questions about **ontology** (what is in the world) and **epistemology** (how we can know what is in the world). For students of world politics, the most important ontological questions concern the state. Is the state the only actor that really matters, or are non-state actors as—or more—important? Does the state that we know today act in essentially the same terms as states in the past, or are the historical changes so important that we need specific theories for other times and places? Are states able to change their views of others from hostility and fear to collaboration? As you have learned from previous chapters, there has never been a consensus in IR on how to answer these ontological questions. Realists hold that the self-help state is the essential unit in international relations and that its drive for **power** or security makes it impossible to move beyond the risk of war (**see Ch. 9**). Liberalists (**see Ch. 7**) disagree, arguing that states can build a more cooperative and peaceful international system. Both realism and liberalism agree, though, that the state is the main building block.

Although ontological assumptions are absolutely central for how we think about the world, scholars and students often go about studying world politics without giving ontology much thought. That is because it comes into view only when theories with different ontological assumptions clash. As long as one works within the same **paradigm**, there is no need to discuss one's basic assumptions, and energy can be devoted to more specific questions. For example, instead of discussing what it requires to be a state, one tests whether democratic states are more or less likely to form alliances than non-democratic ones. One of the strengths of poststructuralism has been to call attention to how much the ontological assumptions we make about the state actually matter for how we view the world, and for the more specific explanations of world politics that we formulate.

Poststructuralism also brings epistemology—questions of knowledge—to the fore. As with ontology, the importance of epistemology is clearest when theories clash over which understanding should be adopted. Mainstream approaches adopt a positivist epistemology. They strive to find the causal relations that 'rule' world politics, working with dependent and independent variables. In the case of **democratic peace** theory, for example, this implies a research agenda where the impact of state type (democratic/non-democratic) on foreign policy behaviour (going to war or not) can be tested systematically (**see Chs 7 and 15**). Poststructuralists, by contrast, embrace a post-positivist epistemology. They

Box 12.1 Causal and constitutive theories— the example of piracy

Causal and constitutive theories produce different research questions, and thus create different research agendas. Taking the example of contemporary piracy, a causal theory might ask: 'what explains variation in the level of piracy in different states in the Global South? Is the cause economic deprivation, military capabilities, or failed political structures?' A constitutive theory asks instead: 'which activities are being included when governments define piracy? And do such definitions constitute military measures as legitimate policy responses?'

argue that the social world is so far removed from the hard sciences where causal epistemologies originate that we cannot understand world politics through cause–effect relationships. Compared to constructivists, who adopt a concept of causality as structural pressure, poststructuralists hold that causality conceptualized as such is inappropriate, not because there are no such things as **structures,** but because these structures are constituted through human action. Structures cannot therefore be independent variables (**see Box 12.1**). **Constitutive theories** are still theories, not just descriptions or stories about the world, because they define theoretical concepts, explain how they hang together, and instruct us on how to use them in analysis of world politics. Thus it is not easier or less rigorous to develop non-causal, constitutive theories; it is just different.

The distinction between causal and non-causal theories is also captured by the distinction between **explanatory theories** and constitutive theories. As you read through the literature on world politics, you will encounter other labels that point to much the same things, with causal–constitutive, explanatory–constitutive, and **foundationalist**–**anti-foundationalist** being the most common ones. Foundationalists hold that we can say whether something is true or not if we examine the facts; anti-foundationalists, by contrast, hold that what counts as 'facts' and 'truth' differ from theory to theory, and that we cannot therefore find 'the' truth. Different IR theories take different views on whether we can and should agree on one set of facts, and thus on whether we should adopt a foundationalist position. Explanatory, positivist theories are usually foundationalist, and constitutive, non-positivist theories are usually anti-foundationalist. Because poststructuralism argues in favour of a constitutive, post-positivist, anti-foundationalist position, it is seen as one of the most alternative approaches in IR.

Epistemology is also important at a more concrete level of analysis, because one's epistemology leads one to select different kinds of 'facts' and to treat them differently. To take the example of ethnic war, realist and liberal analyses look for the factors that explain why ethnic wars occur. Here, the relevant facts are the number of ethnic wars, where and when they took place, and facts we hypothesize might explain them: for instance, forms of government or economic **capabilities**. Poststructuralism, by contrast, asks what calling something an 'ethnic war' implies for our understanding of the war and the policies that could be used to stop it. Here, the facts come from texts that document different actors' use of 'war labels'.

Key Points

- Poststructuralists raise questions about ontology and epistemology.
- Poststructuralism is critical of statism and of taking the anarchical system as fixed and timeless.
- Poststructuralism adopts a constitutive epistemology.
- What count as facts depends on the ontological and epistemological assumptions a theory makes.

12.3 Poststructuralism as a political philosophy

As mentioned in the Introduction, IR poststructuralists bring philosophical ideas and concepts to the study of world politics. Some of the leading poststructuralist philosophers were French, and many of their ideas about identity, power, and conflict developed in the context of the decolonization of the French empire, especially the wars of Algerian independence. Poststructuralist concepts can be quite complex and hard to explain, but let us begin with four of them that have been particularly influential: discourse, deconstruction, genealogy, and intertextuality.

12.3.1 Discourse

Poststructuralism holds that language is essential to how we make sense of the world. Language is social because we cannot make our thoughts understandable to others without a set of shared codes. This is captured by the concept of **discourse**, which the prominent French philosopher Michel Foucault defined as a linguistic system that orders statements and concepts. Foucault introduced his concept of discourse in the

late 1960s, in part as a critique of Marxist theories that privileged economic structures. This, to poststructuralist theorists like Foucault, overlooked the way in which humans use language to make sense of the social world in ways that are not determined by the economy. Politically, language is significant because politicians—and other actors relevant to world politics—must legitimate their foreign policies to audiences at home and abroad. The words we use to describe something are not neutral, and the choice of one term over another has political implications. To take an example, if what happens in a place is described as 'a **genocide**', there is a strong moral pressure on the **international community** to 'do something', but not if what happens is described as '**tribal**' warfare'.

As this example demonstrates, poststructuralism understands language not as a neutral transmitter, but as producing meaning. Things do not have an objective meaning independently of how we constitute them in language. This does not mean that things do not happen in the real world—for instance, if someone fires a loaded gun at you, then you will get hurt. But it does mean that there is no given essence to 'a thing' or 'an event': is the shooting an accident, an attack, or divine retribution for something bad you did? The possible meanings that can be assigned to a specific event thus depend on the discourses that are available. For example, we might attribute an illness such as a heart attack to either our lifestyle (how we eat, live, drink, and exercise), or to our genes (which we cannot do much about), or to divine punishment. Using the concept of discourse, we can say that heart attacks are constituted differently within a 'lifestyle

discourse', a 'genetic discourse', and a 'religious discourse'. Each discourse provides different views of the body, what can be done to prevent disease, and thus what policies of disease prevention should be adopted. Poststructuralists stress that discourses are not the same as ideas, and that materiality or 'the real world' is not abandoned (**see Box 12.2**). To take materiality seriously means, for example, that advances in health technologies can change the way that discourses construct those afflicted by heart attacks or other diseases such as cancer or HIV/AIDS. Video and photography can also be understood as a way of communicating the materiality of what is taking place at a given point in time (**see Case Study 12.1**).

Box 12.2 Ernesto Laclau and Chantal Mouffe on the materiality of discourse

The fact that every object is constituted as an object of discourse has *nothing to do* with whether there is a world external to thought, or with the realism/idealism opposition. An earthquake or the falling of a brick is an event that certainly exists, in the sense that it occurs here and now, independently of my will. But whether their specificity as objects is constructed in terms of 'natural phenomena' or 'expressions of the wrath of God', depends upon the structuring of a discursive field. What is denied is not that such objects exist externally to thought, but the rather different assertion that they could constitute themselves as objects outside any discursive condition of emergence . . . we will affirm the *material* character of every discursive structure. To argue the opposite is to accept the very classical dichotomy between an objective field constituted outside of any discursive intervention, and a discourse consisting of the pure expression of thought.

(Laclau and Mouffe 1985: 108; emphasis in original)

Case Study 12.1 Discourses, images, and the victory of the Taliban regime

A United States Air Force plane taking off from Kabul airport, Afghanistan, August 2021
© Verified UGC via AP

On 16 August 2021 a short video caught the world's attention. It showed dramatic scenes of people hanging onto a plane belonging to the United States Air Force as it took off from the airport in Kabul, the capital of Afghanistan. At the end of the video, at least two people could be seen falling to their deaths. As the Taliban regime had taken control of Afghanistan, and at a faster pace than anticipated, many Afghans were trying to flee the country. The airport in Kabul, still under American control, became the place to get out.

The video from 16 August was a particularly striking example of the videos and photographs that were documenting events at the Kabul airport. Those images provided a way of representing 'Afghans' not as a general, abstract group of people, but as living human beings. The images from the airport also showed that the American exit from Afghanistan was hurried, chaotic even. As such, they were a challenge to dominant American—and

---

Western—discourses which normally constitute their armies as being powerful and in control. From a poststructuralist theoretical perspective, images can play central roles in supporting and questioning foreign policy discourses.

Later on the same day, President Biden gave a long speech on the situation in Afghanistan (Biden 2021a). He described the scenes as 'gut-wrenching', particularly for those Americans who had spent 'time on the ground working to support the Afghan people'. Biden echoed a general discourse in Western media which constituted the images as showing how truly desperate Afghans were to get out of Afghanistan and how much they feared the incoming Taliban regime. Some asked whether the US and other countries should be leaving Afghanistan, handing over the country to a regime which had terrorized the population 20 years earlier.

This was not the discourse that Biden adopted. He was adamant that leaving Afghanistan was the right decision. As the president of the United States, Biden held that his goal was to pursue the 'only vital national interest' of America—that is, 'preventing a terrorist attack on American homeland'. Looking back on past policies, Biden argued that the US should not have attempted to conduct 'nation-building' in Afghanistan. What was happening in Afghanistan right at that moment was a product of Afghan political leaders fleeing and Afghan military

forces 'not willing to fight for themselves' even though America had provided them with 'every tool they could need'. American troops should not, in short, 'fight on endlessly in another . . . country's civil war'.

Protecting the rights of Afghan women and children played a central role when the West intervened in 2001 (Shepherd 2006). Because of the traditional constitution of 'women and children' as subjects worthy of protection, they figured strongly in discussions in August 2021 of how the international community should respond to the return of the Taliban regime (**see Section 17.5**). What was noteworthy in Biden's speech was that he made a brief reference to his continued support for 'the Afghan people' and the basic rights of 'women and girls', but only a vague gesture to 'diplomacy, our international influence, and our humanitarian aid' as ways to protect such rights.

Question 1: What theory/theories of world politics is Biden articulating in his speech?

Question 2: What is the relationship between the following subjects in Biden's speech: 'Afghan political leaders', 'Afghan forces', 'the Afghan people', and 'Afghan women and children'? Is it possible to identify an unstable relationship between some of these subjects?

12.3.2 Deconstruction

To see language as a set of codes means that words (or signs) make sense only in relation to other words. We cannot know what 'horse' means unless that word is connected to other words: 'animal', 'furry', 'hoofed', and 'fast'. Moreover, we know what something is only by comparing it to something it is not. A 'horse' is not 'human', 'feathered', 'legless', or 'slow'. To see language as connected signs underscores the structural side of poststructuralism (**see Box 12.3**).

What differentiates poststructuralism from structuralism (or more precisely structural linguistics) is that poststructuralism sees **sign structures** as unstable because connections among words are never given once and for all. To take the 'horse', it might be 'an animal', but in many situations it is seen as more 'human' than 'real animals' such as 'pigs' or 'worms'. Its 'animalness' is itself unstable and given through other signs at a given time and place. This might at first seem quite far removed from world politics, but it tells us that the ways we describe events, places, peoples, and states are neither neutral nor given by the things themselves. For example, in 2002, when President George W. Bush spoke about an '**axis of evil**' threatening the Western world, this implied a radical difference between the US and the countries

Box 12.3 'Postmodernism' and 'poststructuralism'

Poststructuralism does not mean 'anti-structuralism', but a philosophical position that developed out of structuralism . . ., a position which in many ways shares more with structuralism than with its opponents.

(Wæver 2002: 23)

'Postmodernism' refers to a historical period (usually after the Second World War) and also to a direction in art, literature, and architecture; it is used to describe new empirical phenomena such as 'postmodern war' [see Ch. 14]. In contrast, poststructuralism refers to a body of thought that is not confined to a specific historical period. Poststructuralism and postmodernism are often conflated by non-poststructuralists in International Relations.

(D. Campbell 2007: 211–12)

(Iraq, Iran, and North Korea) claimed to make up this axis.

The French philosopher Jacques Derrida's theory of **deconstruction** posits that language is made up of dichotomies, for instance between the developed and the underdeveloped, the modern and the pre-modern, the civilized and the barbaric. These dichotomies are not 'neutral', because in each case one term is superior to the other. There is a clear hierarchy between the

developed–modern–civilized on the one hand and the underdeveloped–pre-modern–barbaric on the other. Deconstruction shows how such dichotomies make something look like an objective description—for instance how developed a country is—although it is in fact a structured set of values. Poststructuralists disagree on whether one might describe deconstruction as a methodology (see Box 12.4), but agree that a central goal is to problematize dichotomies, show how they work, and thereby open up alternative ways to understand world politics.

12.3.3 Genealogy

Genealogy is another of Foucault's concepts, defined as a 'history of the present'. Foucault drew on earlier writings on genealogy by the late-nineteenth-century German philosopher Friedrich Nietzsche. Nietzsche—and Foucault—held that a key element of the European tradition is to speak of history as having clear beginnings and endings. This, however, makes a far too homogeneous story out of what are in fact gradual, contested, and often forgotten histories. A main aim of genealogy in the tradition of Nietzsche is to draw attention to the politics that are involved in making history look a particular way. Genealogy starts from something contemporary, say climate change (see Ch. 24),

and asks two questions: what political practices have formed the present and which alternative understandings and discourses have been marginalized and often forgotten? A genealogy of climate change might start by asking who are allowed to speak and make decisions at events such as the United Nations Climate Change Conferences. Then it asks what constructions of 'the climate' and '**global responsibility**' are dominant, and how these constructions relate to past discourses. By looking into the past, we see alternative ways to conceptualize humans' relationship with 'the climate' and gain an understanding of the discursive and material structures that underpin the present.

12.3.3.1 The concept of power

The concepts of genealogy and discourse point us towards Foucault's conception of power. Power, to Foucault, is 'productive': it comes about when discourses constitute particular subject positions as the 'natural' ones. 'Actors' therefore do not exist outside discourse; they are produced through discourse and need to be recognized by others. We can see such actor-recognition processes unfold when oppositional movements challenge existing governments, as occurred during the Arab Spring, making the question of who represents 'the people' become crucial. It is also an instance of power when states and **institutions** establish themselves as having the knowledge to govern a particular issue. Knowledge is not opposed to power—as in the classical phrase 'speaking truth to power'—but is integral to power itself. As a concrete example, take the way Western scholars have 'gained knowledge' about non-Western peoples by describing them as inferior, backward, underdeveloped, and sometimes threatening. This takes for granted that a foreign **identity** exists and that it can be studied (see Ch. 11). More broadly, to speak from a position of knowledge is to exercise authority over a given issue.

Poststructuralists in IR have also picked up one of Foucault's more specific conceptualizations of power: that of 'biopower'. Biopower works at two levels: at the individual level we are told to discipline and control our bodies, and at the collective level we find that governments and other institutions seek to manage whole populations (Epstein 2007). A good example of **biopolitics** is that of population control, where states have promoted such 'body-disciplining' practices as abstinence from sex before marriage and use of contraceptives in an attempt to reduce the number of births or prevent particular groups of women from getting

pregnant. Practices targeted at the individual are built around the idea that there is 'a' population that can be studied and steered in a particular direction.

It is clear that poststructuralism's concept of power goes beyond that of realism, which defines power as material capabilities (see Ch. 9). Compared to constructivism, which also considers knowledge and identities (see Ch. 13), poststructuralism looks more critically at how actors get to be constituted as actors in the first place. One of the key issues in the discussions over poststructuralism as an approach to international relations is whether it provides a good account of the way that materiality and power impact world politics (see Opposing Opinions 12.1).

12.3.4 Intertextuality

The theory on **intertextuality** was developed by the semiotic theorist Julia Kristeva. It argues that we can understand the social world as comprised of texts. This is because texts form an 'intertext'—that is, they are connected to texts that came before them. In some situations this is self-evident. Take, for example, declarations made by international institutions such as the **North Atlantic Treaty Organization** (NATO), the **European Union** (EU), and the United Nations, which quote previous declarations and perhaps statements by member countries. But intertextual relations are also made in more abstract ways. For example, to say that 'the Balkans' is filled with 'ancient hatred' is to draw on a body of texts that constitutes 'the Balkans' as pre-modern and barbaric. Intertextuality might also involve images, or interpretations of events that are not exclusively written or spoken. For instance, when presidents meet in front of television cameras expressing their commitment to solve international crises, we look not just at what is said but at what having such a meeting signifies. The presidential press conference is, in other words, an important 'sign' within

---

Opposing Opinions 12.1 Poststructuralism provides a good account of the role that materiality and power play in world politics

For

Material objects get their meaning through discourse. Taking the hard case of nuclear weapons, it clearly matters which country has them: some countries are considered 'safe' owners, others are not. For example, it is impossible to understand policies that seek to prevent Iran from gaining nuclear weapons without an analysis of how 'Iran' is represented in discourse.

Discourse is a form of power. Representations of states, institutions, and other actors in world politics are not neutral descriptions that describe the world as it 'really is'. For instance, to constitute migrants drowning as they seek to cross the Mediterranean Sea as a 'tragedy' provides a different representation than to constitute such deaths as a product of 'Fortress Europe'.

Foreign policies are justified through historical discourse. Foreign policy discourse is saturated with references to history, for example to 'we' as the legitimate inhabitants of a given territory. Such historical claims are also practices of power and often deeply politicized. For example, the Russian government has pointed to the history of Crimea as supporting its 'return' to Russia in 2014.

Against

Material objects exist and matter independently of discourse. Poststructuralists overly emphasize representations in language; this causes them to overlook the importance of non-linguistic factors. For example, there is a real threat that rising sea levels will eradicate small island states such as Tuvalu, independently of whether the threat is talked about or not.

Discourses may overlook structures of power. Poststructuralism misses differences in material power that are not put into language. For instance, gender-based violence is often not articulated by those subjected to such violence.

Not all of history is constructed. Although history might be contested from time to time, we should not dispense with the idea that objective historical facts exist. For example, it is a fact that around 8,000 men and boys were killed by Bosnian Serbian forces at Srebrenica in July 1995.

---

1 Do you agree with critics that poststructuralism cannot be used to understand the materiality of issues such as nuclear weapons and climate change?

2 What forms of power are most significant, in your view? What are the strengths and weaknesses of poststructuralism when analysing those forms of power?

3 What role do historical facts—and representations of historical facts—play in the relationship between Russia and Ukraine, for example? What can you add to the debates over poststructuralism based on this case?

Visit the online resources to discover pointers to help you tackle these questions.

the larger text that defines **diplomacy**. Intertextuality also implies that certain things are taken for granted because previous texts have made the point so many times that there is no need to state it again. If you read through NATO documents from the cold war, you will find that they might not necessarily mention the Soviet Union all that much. That is because everyone at the time knew that NATO's main purpose was to deter the Soviet Union from attacking members of NATO. Working with intertextuality, we should therefore ask ourselves what a given text does not mention, either because it is taken for granted or because it is too dangerous to say.

At the same time that intertextuality points to the way in which texts always 'quote' past texts, it also holds that individual texts are unique. No text is a complete reproduction of an earlier one. Even when one text incorporates another by quoting it in full, the new context modifies the older text. This is of significance to the study of world politics because it underscores the fact that meaning changes when texts are quoted by other texts. Take the Muhammad cartoons that were printed by the Danish newspaper *Jyllands-Posten* in September 2005. They have now been reproduced by many other newspapers and on the internet, and many different interpretations have been offered. If you look at the cartoons today, you cannot therefore 'read' them in the same way as when they were first published.

12.3.4.1 *Popular culture*

The argument that we should understand world politics through the lens of intertextuality has prompted poststructuralists to look at forms of text that are not normally discussed by IR theories. James Der Derian has studied the intertext of popular spy novels, journalism, and academic analysis (Der Derian 1992). Others, including Michael J. Shapiro (1988, 1997) and Cynthia Weber (2006), analyse television shows, film, and photography. Poststructuralists hold that there are several reasons why we should pay attention to **popular culture**. For one, states take popular culture seriously, even if it is 'just fiction'. In 2014, the American comedy *The Interview*, which features an assassination plot against

North Korean leader Kim Jong Un, became the subject of North Korean government protest and hacking against Sony Pictures, the company that produced the movie. Another reason why we should take popular culture seriously—and why states do too—is that film, television, music, and video are watched and listened to by millions of people across the world. As the world has become increasingly globalized, popular culture can spread quickly from one place to another and new media technologies, such as smartphones, Facebook, and Twitter, have fundamentally changed who can produce the 'texts' of world politics. Think, for example, of the photos showing inmates being abused by American guards working at the Iraqi prison Abu Ghraib, which caused a global uproar in 2004, and the videos of beheadings that circulate on the internet today. Finally, popular culture provides us with complex, critical, and thought-provoking visions of world politics. For example, films made about the Vietnam War such as *The Deer Hunter* and *First Blood* (the first of the Rambo movies) helped generate debate over the war itself and the traumas faced by returning soldiers. Another example is the widely acclaimed graphic novel *Persepolis* by Marjane Satrapi, which shows what it was like growing up in Iran during and after the revolution in 1979.

Key Points

- Four concepts from poststructuralist philosophy have been used to produce new knowledge about world politics: discourse, deconstruction, genealogy, and intertextuality.
- To look at world politics as discourse is to study the linguistic structures through which materiality is given meaning.
- Deconstruction argues that language is a system of unstable dichotomies where one term is valued as superior.
- Genealogy asks which political practices have formed the present and which alternative understandings and discourses have been marginalized and forgotten.
- Intertextuality holds that we can see world politics as made up of texts, and that all texts refer to other texts yet each is unique.

12.4 Deconstructing state sovereignty

Poststructuralists use the four key concepts (discourse, deconstruction, genealogy, and intertextuality) to answer the 'big questions' of IR. What is the status of the state? Is the international system

doomed to recurring conflicts and power politics, as realism holds? Or is it possible to move towards more cooperative arrangements, as liberalism argues?

12.4.1 The inside-outside distinction

Poststructuralists agree with realists that the state is absolutely central to world politics. Yet, in contrast to realists, who take the state for granted, poststructuralists deconstruct the role the state plays in world politics as well as in the academic field of IR. Arguing that the state is not 'a unit' that has the same essence across time and space, R. B. J. Walker (1990) holds that the state is a particular way to organize political community. The question of political community is of utmost importance to national as well as international politics because it tells us why the forms of governance that are in place are legitimate, who we can trust, who we have something in common with, and who we should help if they are under attack, suffering, or hungry (see **Ch. 31**). The significance of political community is perhaps most striking when states fall apart and separate into new states, such as happened with the Soviet Union, Czechoslovakia, and Yugoslavia in the 1990s, and more recently with Sudan. Such processes involve reconstruction of who 'we' are and an idea of how new collectives differ from those who were part of the old state.

The sovereign, territorial state's unrivalled position as the unit of political community in contemporary world politics resulted from a series of events and processes that began with the **Treaties of Westphalia** (see **Ch. 3**). Walker tells us that this transition from the medieval to the modern state system is important because it shows us two different ways of organizing political community. In the medieval world there were so-called overlapping authorities. This means that religious and political authorities—the Pope and the emperors and those below them—were interwoven, and there was no single institution that could make sovereign decisions. This changed with the Treaties of Westphalia as states became the sovereign authorities in their own territories and in relations with each other. In terms of relations among people, the medieval world worked according to what Walker calls a principle of 'hierarchical subordination'. Hierarchical subordination assigns each individual to a particular position in society. At the top were the Emperor and the Pope, next came the bishops and the kings, then the priests and local nobility, and at the bottom were those who owned nothing and who had no rights. The Treaties of Westphalia began a process whereby people became more closely linked to states, and after the French Revolution each citizen had the same status. This did

not mean that all individuals were citizens or that all citizens had the same amount of wealth, education, or property, but there was no longer anything in a person's nature, as with the principle of hierarchical subordination, that made him or her inherently superior or inferior.

State sovereignty implies, in Walker's words, a division of the world into an 'inside' the state (where there is **order**, trust, **loyalty**, and progress) and an 'outside' (where there is conflict, suspicion, self-help, and anarchy). Walker then uses the principle of deconstruction to show that the national–international distinction is not simply an objective account of how the 'real world' works. The distinction is not maintained by something that is externally given, but rather by the way in which the two sides of the dichotomy reinforce each other: we know the international only by what it is not (national), and likewise the national only by what it is not (the international). The world 'inside' states not only differs from the international realm 'outside'; the two are constituted as each other's opposition. The inside–outside dichotomy is stabilized by a long series of other dichotomies, including those of peace and war, reason and power, and order and anarchy (see **Fig. 12.1**).

Poststructuralists have shown how the inside–outside dichotomy, which like all dichotomies is inherently unstable, is held in place by being reproduced again and again. For example, the Covid-19 pandemic illustrates how state sovereignty is reinforced and also challenged (see **Case Study 12.2**). States reproduce state sovereignty, and so do academic texts. For example, Richard K. Ashley points to realism's 'double move' (Ashley 1987: 413–18). The first move is to assume that

Inside–the state		Outside–the international
Order	←→	Anarchy
Community	←→	Difference
Reason	←→	Power
Trust	←→	Suspicion
Progress	←→	Repetition
Cooperation	←→	Self-help
Law	←→	Capabilities
Peace	←→	War

Figure 12.1 The inside–outside dichotomy and its stabilizing oppositions

Case Study 12.2 Covid-19, state sovereignty, and vaccines
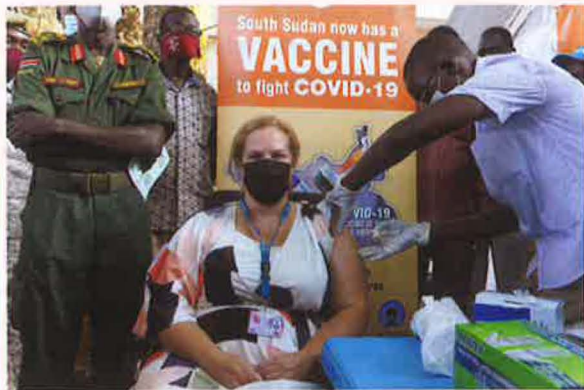
Covid-19 vaccination campaign in South Sudan
© Andreea Campeanu / Stringer / Getty Images

The Covid-19 virus which was first detected in Wuhan, China, became a global pandemic in 2020. Many countries closed their borders and adopted large-scale societal lockdowns. The terminology of the pandemic as coming in 'waves' was used to identify the rises and falls in the numbers of infections and deaths. The introduction of the first vaccines at the end of 2020 was constituted as a landmark event in combating the virus. The discovery of new mutations of the virus then constituted other landmark events raising concerns about the effectiveness of vaccines.

A central question from a poststructuralist perspective is whether Covid-19 reinforces or challenges state sovereignty. Was the pandemic constituted as calling for 'national communities' to be protected, or were there articulations of 'global responsibility' too? Travel restrictions can be seen as states (re)turning to a classical conception of state sovereignty. The calls for citizens abroad to 'return home' and foreign ministries assisting such returns can also be interpreted as based on a traditional understanding of who belongs to the national community. As the vaccines were introduced, countries who had access to vaccines prioritized their own populations.

But it is also possible to see aspects of the Covid-19 pandemic that challenge state sovereignty. The way in which the virus spread is a strong indication of how many people actually move across borders every day. In late November 2021, for example, many countries stopped flights from Southern Africa in response to the Omicron mutation. In spite of this action, Omicron was discovered within days in countries across Europe, North America, South America, Asia, and Australia.

The distribution of vaccines has also taken place within international frameworks that show that states might not just be concerned with their own populations. The main such framework is COVAX, which was set up to create 'global equitable access to COVID-19 vaccines'. As stated on the World Health Organization (WHO) website, with a fast-moving pandemic, 'No one is safe, unless everyone is safe' (WHO 2021a). By 29 November 2021, as the world's concern centred on Omicron, a joint statement by COVAX, the African Vaccine Acquisition Trust (AVAT), and the Africa Centres for Disease Control and Prevention reported that COVAX and AVAT had distributed over 90 million doses to African countries (WHO 2021b). The statement held that more donations were needed for Africa to reach the recognized 'global goal' of immunising 70% of the African population' and that both the quality and the shelf life of the donated vaccines had to improve. This, in short, gave the impression that even though wealthier countries were providing vaccines to those in need, they were doing so when they had doses to spare, not on a continuous basis.

Question 1: Does the statement 'no one is safe, unless everyone is safe' challenge state sovereignty? Is there a way to respond to Covid-19 that emphasizes global ethical responsibility?

Question 2: Is the representation of Covid-19 as a pandemic the same today as in 2020–1? Has there been a strengthening of state sovereignty or not?

we can only understand '**community**' in one way: the one we know from domestic politics. When we think of 'international community', our understanding of this concept is built on what we know from the state. The second move consists of arguing that such a community is possible only within the territorial state. The harmony, reason, and justice that are possible within states cannot be extended to the international sphere, as this is fraught with anarchy, recurring warfare, and power politics.

12.4.2 The strength of state sovereignty

When poststructuralists write about the inside–outside dichotomy, however, they are not claiming that

the world works neatly in that way. There are plenty of states where domestic politics does not follow the description of the 'inside' as one of progress, reason, and justice, yet the national–international dichotomy still manages to govern much of world politics. More critically, we might say that the success of the inside–outside dichotomy is shown by how well it silences numerous 'facts' and 'events' that should undermine it. For example, we can see the national–international dichotomy at work when states choose not to intervene in other states that are persecuting their 'own' citizens, despite increased invocation of the 'right to protect' principle in recent years.

One of poststructuralism's strengths is that it points to how state sovereignty is often both questioned

and supported. For instance, the 9/11 attacks and the **war on terror** undermined state sovereignty at the same time that Western states saw them through the lens of state-based territoriality: 'American soil' was attacked and the Taliban regime in Afghanistan was held responsible for what happened on 'its' **territory**. Before we declare the inside–outside distinction dead and gone, we should therefore take its flexibility and resilience into account.

12.4.3 Universal alternatives

Poststructuralists warn that although our deconstruction of state sovereignty makes it look less like an objective fact, it is not easy to transcend, nor can it be replaced by a '**global community**'. As R. B. J. Walker puts it, 'The state is a political category in a way that the world, or the globe, or the planet, or humanity is not' (Walker 1997: 72). To engage a dichotomy is not simply to reverse the hierarchy between its terms (that is, replace 'the state' with 'the global'), but rather to rethink all the complex dichotomies around which it revolves. If we leave the state in favour of the global, a crucial question becomes how to prevent a return to the model we know from the medieval world—that is, one of a global community where individuals are ranked and given different value. Poststructuralists hold that claims to 'global', 'universal' solutions always imply that something else is different and 'particular'. And that which is different is almost always in danger of being forced to change to become like the universal. Poststructuralists are therefore sceptical of idealists or liberals who advocate universal principles, but who overlook the power involved in defining what is the 'universally' good and right (**see Ch. 32**).

The dangers—and power—of universal discourse are demonstrated by the discourse of Western governments with troops in Iraq and Afghanistan in the mid- and late 2000s (**see Ch. 7**). In this discourse,

'fighting **terrorism**' sought to defend 'freedom', 'liberty', 'security', and 'democracy' (**see Ch. 29**). Although this might at first sound unproblematic—even appealing—the problem is that this set of universally good categories is spoken and defined not by a truly global voice, but by a particular set of states. The good 'universal' categories were aimed at those who were not—yet or ever—part of that universal project, and this universalist discourse reinforced 'the West' as the only entity that could define 'real' universalism. To many, and not only poststructuralists (**see Ch. 11**), this echoes the time when the colonial West had the power, right, and 'obligation' to define what was good for the rest of the world.

Poststructuralism's critique of universalism shows that although poststructuralists are critical of realism, they agree with realists that we should take power and the state seriously. Many poststructuralists see much of value in classical realism because it is historically sensitive and concerned with the big political and normative questions of world politics. On the other hand, they criticize **neorealism** for its ahistorical view of the state, its reification of the international structure, and its positivist epistemology.

> **Key Points**
>
> - State sovereignty is a practice that constitutes identity and authority in a particular manner.
> - Poststructuralists deconstruct the distinction between the national and the international by showing that the two terms stabilize each other and depend on a long series of other dichotomies.
> - The global is not a political category like the state, and therefore cannot replace it.
> - Poststructuralists warn against the danger of universalist discourse because it is always defined from a particular position of power.

12.5 Identity and foreign policy

Poststructuralists have also moved from the general study of state sovereignty to ask how we should understand foreign policy. In traditional foreign policy analysis, foreign policies are designed to defend the state (security policies), help it financially (economic policies), or make it do good in the world (development policies). By contrast, poststructuralists hold that there is no stable object—the state—from which foreign

policies are drawn, but that foreign policies rely on and produce particular understandings of the state. Foreign policies constitute the identity of the Self through the construction of threats, dangers, and challenges—that is, its Other(s). As Michael J. Shapiro puts it, this means that the politics of representation is absolutely crucial. How we represent others affects the representation of our selves, and this representation is decisive for which

foreign policies we choose (Shapiro 1988). For example, debates in the EU over whether Turkey should be accepted as a new member centre on judgements about whether Turkey is a European country and whether it is possible to be European and Muslim at the same time. The way in which EU countries answer these questions has implications not only for the construction of Turkey's identity, but for that of **Europe's**. Foreign policies are thus not protecting a given and fixed identity, but rather are discourses through which identities are (re)produced.

12.5.1 Identity as performative

Theoretically, poststructuralism conceptualizes identity as relational and performative. The concept of performativity comes from Judith Butler: it holds that identities have no objective existence, but rather that they depend on discursive practices (D. Campbell 1992). Identities are socially 'real', but they cannot maintain their 'realness' if we do not reproduce them. Because identities have no existence independently of the foreign policies that produce and reproduce them, we cannot say that identities cause foreign policy. To take the example of the EU and Turkey, there is no objective European identity that can be used to arbitrate a decision on Turkish membership. Rather, it is through debates over Turkey's membership application that European identity is being defined. Does this mean, then, that foreign policies cause identities? No, because foreign policies are at the same time made with reference to understandings of identity that are to some extent already in place. In the case of the EU, the discourse on Turkey does not start from scratch, but with historically powerful constructions of Europe as white, Christian, civilized, and modern. In short, identities are simultaneously a product of and the justification for foreign policies. If we go back to the discussion of epistemology at the beginning of this chapter, we see that we cannot theorize the relationship between identity and foreign policy in causal terms. Instead, this is a constitutive relationship (see Fig. 12.2). This also means that poststructuralism theorizes identity differently from liberalism. As you may recall from **Chapter 7**, liberalists incorporate identity, but hold that it might determine a state's outward orientation. According to this account, identity has a causal impact on foreign policy.
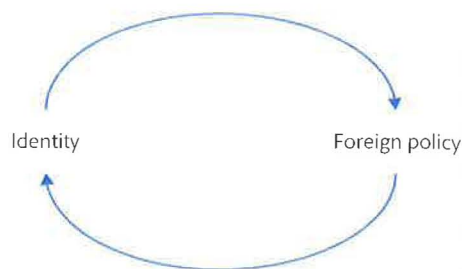

Figure 12.2 The constitutive relationship between identity and foreign policy

Probably the most important development of a performative theory of identity and foreign policy is David Campbell's *Writing Security: United States Foreign Policy and the Politics of Identity*, first published in 1992. Campbell takes a broad view of what foreign policy is and distinguishes between 'Foreign Policy' (the policies undertaken by states in the international arena) and 'foreign policy' (all those discursive practices that constitute something as 'foreign' in relation to the Self). 'Foreign policy' might just as well take place within states as between them. It might, for instance, involve **gender** and **sexual relations**, as when women are deemed unfit to participate in the military because they lack the proper 'mindset' (and thus would be dangerous for male soldiers to fight alongside), or when homosexual or queer people are described as alien to the national sense of self. By looking not only at Foreign Policy, but also at 'foreign policy', poststructuralism casts light on the symbolic boundaries that are constituted within and across states.

Much of poststructuralist scholars' concern has focused on what Campbell calls the 'discourses of danger'. Because such discourses work with very clear dichotomies, it is easy to see how the Other defines the Self. Yet poststructuralism also investigates those identities that are not so radically different from the Self. Beyond the simple construction of Self-radical Other, more complex identity constellations exist that can involve several Others. Such Others might threaten each other rather than the Self and be constituted by different kinds of otherness. One case that highlights such more complex constellations is the war in Bosnia in the 1990s, where one Other (Bosnian Muslims) was threatened by another Other (Bosnian Serbs). This challenged the international community to undertake a **humanitarian intervention** (see **Ch. 33**). Poststructuralists have

Case Study 16.2 Globalization and child labour

The United States Department of Labor (2020) confidently estimates that there were some 152 million children in child labour across the world in 2020, with 73 million children engaged in hazardous child labour. It estimates that 25 million adults and children are working in conditions of forced labour. It identifies 155 goods from 77 countries as being produced using forced or child labour, and its list of suspected goods is longer.

Unfortunately, it is entirely likely that we will all at some point have garments in our wardrobes made using forced or child labour, eat food whose ingredients were produced using forced or child labour, or conduct our working and personal lives using computers, mobile phones, and other electronic devices produced by adults and children working in these conditions.

This might surprise you, given that there has been so much attention in recent years to corporate social responsibility and government legislation to outlaw these worst forms of labour exploitation. But forced and child labour remain persistent problems, with many root causes. The sheer scale and complexity of GVCs mean that 'traceability' remains a challenge, even for well-intentioned firms and consumers, but with obvious possibilities for those firms, factories, suppliers, or producers inclined to take advantage. The globalization of production has been motivated in many sectors by the search for lower labour costs and more permissive regulatory environments. Government legislation around the world can be inadequate, or poorly enforced even where decent legislation is in place. In countries such as India,

households—where much child labour takes place—remain excluded from legislation which focuses on factories and other kinds of workplaces. Multidimensional poverty—on the scale we have documented in this chapter—remains an important driving force in determining the incidence of child labour. And child labour is strongly inter-generational, associated as it is with the deprivation of rights to education for many children, especially girls (N. Phillips 2013; Phillips et al. 2014).

It is tempting to see child labour as a problem that is concentrated in areas of the world or sectors of production that are less integrated into the global economy—that it is a problem of 'not enough' globalization, and the presence of TNCs is more likely to make a difference, even if only driven by reputational and branding concerns. It is tempting to see it as a problem of 'traditional' practices in society that will be eradicated as the globalization process advances across the world. But it is clear that this would be an optimistic view. Child labour is not caused by globalization alone, but globalization has not eradicated child labour, and GVCs are associated with the conditions in which child labour can persist and even flourish.

Question 1: Is it surprising to you that child labour persists in the contemporary global economy?

Question 2: What role can consumers play in addressing child labour, and what are the limits to consumers' ability to bring about change?

their global mobility as a means of generating opportunities for themselves. Their mobility oils the wheels of global economic activity in sectors as diverse as commerce, finance, education, and medicine. At the other end of the spectrum is the kind of global labour force described in **Section 16.4.2**, where migrants are disproportionately represented in the low-paid, low-skill parts of global production, or in sectors supplying services to the more privileged, professional parts of society, including 'lifestyle' services such as domestic work. Such patterns of migration connected with domestic service are global, and include as examples the movement of workers from the Philippines to Hong Kong, Mexico to the United States, Nicaragua to Costa Rica, or Indonesia to the United Arab Emirates, as well as movement within countries.

The realities of precarious employment are magnified by the particular vulnerabilities of migrant workers. Migrant workers often lack the power to engage in political action concerning wages and working conditions, and they do not possess the rights and entitlements associated with citizenship or residency. Laws

governing immigration or internal movements often act to strip workers of labour or welfare protections, and constrain their ability to seek satisfactory working conditions by changing employers. These laws can also provide mechanisms for employers to manipulate workers, particularly if they are undocumented, such as the threat of denunciation to immigration authorities. The global migrant labour force is strongly associated with economic need and the requirements of supporting families at home.

In one sense, this suggests that migrant workers are among the losers from globalization. The deregulation of labour markets, the power of private firms, the retraction of welfare and social protection under neoliberalism, the demand for abundant and cheap labour in global production, and the massive accumulation of wealth in some sections of society—all have fuelled a situation in which many migrant workers have found themselves at the sharp end of globalization. An alternative viewpoint would argue that increased possibilities for mobility under globalization have presented opportunities for people to migrate to earn better

wages, achieve better levels of education, and enhance their social mobility. Clearly, much depends on how migration is *governed* in the global political economy, particularly in relation to working conditions for migrant workers and the kinds of government policies that govern immigration or the movement of people.

Conversely, an IPE lens reveals that migration is itself a driver of globalization. This is not just in an economic sense, relating to the construction of a highly flexible global labour force, or the supply of global talent to particular industries. Migration also has important implications for the global economy, because increasing levels of global migration are associated with vast

flows of money through global and national financial systems. Officially recorded remittances to the developing world—the sums of money that migrants send home to their families—stood at $540 billion in 2020. After a long trend of very significant growth, this figure was only $8 billion less than in 2019, defying predictions of a downturn as a consequence of the Covid-19 pandemic (World Bank 2021a). Finally, migration has important cultural implications. Particularly in the world's 'global cities' (Sassen 2001), migration has played an important part in some of the dramatic cultural changes that we associate with globalization, and consequently the emergence of new political dynamics across the world.

Key Points

- IPE is concerned with the distribution of power and material resources in the global political economy, and lively debates centre on who wins and who loses from globalization.

- Globalization has been associated with a dramatic widening of inequality, between and within countries, and between and within social groups.

- Labour exploitation underpins the generation of wealth and profits in the global political economy.

- Migration has become truly 'global' in its scope, associated with the movement of highly paid professionals at one end of the spectrum, and low-paid, low-skill workers at the other.

- Migration is itself a driver of globalization, in both economic and cultural terms.

16.5 The future of globalization

As a historical process, globalization has not unfolded in a linear fashion, and the trajectory of globalization outlined in **Section 16.3** included many twists and turns. In the early 2020s, we have arrived at a point where we are once again questioning the future of globalization, with the world shaken by the Covid-19 pandemic, and after a decade when anti-globalist, nativistic, and populist strains of politics have gained ground in countries as diverse as the United States, Brazil, Hungary, the Philippines, France, and the United Kingdom. Across the world, as well, left-leaning politics have long been characterized by a questioning of the value of globalization, given all of its uneven social and economic consequences as we have outlined in this chapter. Does this mean that the process known as 'globalization' has now run aground?

This conclusion is probably premature. We should be wary of basing sweeping assumptions about the historical significance of change on recent turns of events. It remains to be seen whether the system of globalization will hold, so to speak, and withstand this moment

of resurgent nationalism, increased inwardness as we have come to terms with a pandemic, and the manifest consequences of rising inequality. Much also depends on what we mean by 'globalization'. We can legitimately distinguish between globalization as a historical process and its current neoliberal incarnation. It might be valid to conclude that neoliberal globalization is under significant strain: indeed, we have been talking about the exhaustion of the neoliberal model for some time.

But this model is not the only possibility. As we have seen, while it does not conform with the neoliberal development model, the rise of China remains premised on a particular vision of globalization—and indeed is marked by a globalist outlook. It may be that, rather than witnessing its demise, we are in the process of shifting to the next phase in the historical evolution of globalization, one perhaps shaped more by China and the rising powers than by the United States and other Western powers. Yet we do not know what this alternative model will look like, nor how politically and economically acceptable it would be.

It may also be that the forces of globalization are now so powerful—centring on the enormous weight of financial and non-financial corporations—that the status quo will be maintained despite a prolonged period of turbulence. The 2008 financial crisis was widely expected to usher in significant change in the way the global political economy is governed, especially in relation to financial regulation, but this did not prove to be the case. Our current model is clearly resilient.

An alternative scenario is that the nationalist impetus could prevail, as the values of internationalism and **globalism** are overwhelmed once again by reactionary populist politics. As perhaps its most visible exemplar, former US President Donald Trump remains—even out of office—a potent political force, tapping into a strain of political and popular sentiment that has gained ground across a range of countries. At the very least, to avoid this scenario, there will need to be a convincing response to the crushing inequalities in the global political economy which we have touched on in this chapter.

Key Points

- In the early 2020s, we have arrived at a point where we are once again questioning the future of globalization.
- We should be wary of putting too much weight on current and recent events in predicting the future of globalization.

- Nevertheless, the current neoliberal model of globalization is clearly under significant strain, and it is not yet clear what the future will hold.

16.6 Conclusion

This chapter has introduced the rich resources that IPE offers for understanding globalization. It has emphasized that IPE is a tremendously diverse field, encompassing a range of theoretical and methodological traditions and an expansive terrain of empirical interests. Debates about the nature and consequences of globalization continue to rage in IPE, and this chapter has captured some of them by focusing on two areas of contestation: what drives globalization, and who wins and loses from the processes associated with it.

What will the future of IPE hold? No doubt, the lively debates—and disputes—among different parts of the field will continue to thrive. Diverse theoretical preferences and different methods of analysis will continue to vie with one another for greater purchase on the subject matter of IPE. When these debates are conducted in the spirit of open exchanges of perspective and view, they are hugely valuable in advancing the field and enriching the work that goes on within it. But greater dialogue among different schools of IPE, and more productive combining of different perspectives, are also desirable and important: starting with the big questions, and then bringing a range of theoretical perspectives and methods to bear on the task of answering them, can only enhance the breadth and depth of our understanding. After all, much is at stake in understanding how the global political economy works, and in whose interests.

Questions

1. What are the key differences among the major theoretical perspectives in IPE, and where, if at all, do they share common ground?
2. What were the characteristics of the post-war international economic order, and what were the reasons for its eventual breakdown in the 1970s?
3. What are the main characteristics of neoliberal globalization?
4. How are the driving forces of globalization understood in IPE, and which explanations do you find most compelling?
5. Are ideas as important as material resources and institutions in shaping the global political economy?
6. What do we know about the consequences of the rise of China for the global political economy?
7. How can we explain the vast increase in global inequality since the 1980s, and what have been its consequences?
8. Why is labour exploitation such an endemic feature of the global political economy?
9. What is the relationship between migration and globalization?
10. Are we witnessing the death throes of neoliberal globalization?

Visit the online resources to test your understanding by trying the self-test questions.

Visit the online resources to apply theory to practice and take part in the simulation 'Negotiating with China'.

Further Reading

Abdelal, R., Blyth, M., and **Parsons, C.** (eds) (2010), *Constructing the International Economy* (Ithaca, NY: Cornell University Press). A fine collection of essays informed by constructivist approaches to IPE.

Cohen, B. J. (2008), *International Political Economy: An Intellectual History* (Princeton, NJ: Princeton University Press). A map of the field of IPE, and a call for greater dialogue between its major approaches.

Cox, R. W. (1987), *Production, Power, and World Order: Social Forces in the Making of History* (New York: Columbia University Press). One of the founding texts of the contemporary field of IPE, epitomizing the critical IPE approach.

Peterson, V. S. (2003), *A Critical Rewriting of Global Political Economy: Integrating Reproductive, Productive, and Virtual Economies* (London: Routledge). An engaging discussion of IPE rooted in critical feminist theory.

Phillips, N., and **Weaver, C. E.** (eds) (2010), *International Political Economy: Debating the Past, Present and Future* (London: Routledge). A collection of short essays representing the lively debate initiated by Cohen's 2008 book.

Ravenhill, J. (ed.) (2019), *Global Political Economy*, 6th edn (Oxford: Oxford University Press). A leading textbook on IPE, offering rich perspectives on the field and its thematic concerns.

Strange, S. (1988), *States and Markets* (London: Pinter). One of the early founding statements of a new field of IPE, and still one of its most influential contributions.

Watson, M. (2005), *Foundations of Political Economy* (Basingstoke: Palgrave Macmillan). A rich intellectual history of IPE.

Visit the online resources to access the latest updates in the field of International Relations.

Chapter 17

Gender

PAUL KIRBY

Framing Questions

- What are the different ways in which gender shapes world politics today?
- Do men dominate global politics at the expense of women?
- Should international gender norms be radically changed? How?

Reader's Guide

This chapter is about the power of gender in global politics. Gender influences everything from national security to pop culture, the international economy to United Nations missions. Gender is not restricted to a single set of issues, and it does not refer only to women. The chapter begins by explaining how gender is usually defined, what gender scholars and feminists study, and how they contribute to and challenge the discipline of International Relations.

The chapter then introduces the contrast between masculinity and femininity before examining the impact of gender in three spheres: (1) global politics, from the participation of women in decision-making to the very idea of the state; (2) global security, from the distinction between combatant and civilian to women's involvement in political violence; and (3) the global economy, from transformations in the distribution of work to hidden forms of domestic and reproductive labour.

17.1 Introduction

Gender structures our existence in the most intimate ways. How we experience and express gender is inseparable from our personhood, our individuality, and our interactions with others in families, classrooms, workplaces, and cultures. How gender is understood socially—how, in other words, we are *allowed* to do gender—determines who it is possible for us to become. And yet gender was long neglected by the discipline of International Relations (IR), seen as irrelevant to world International politics proper, the province of other social sciences. From the inter-war period usually seen as the origin of the discipline onwards, feminists have been writing about gender and practising politics (**see Ch. 10**). It is still primarily feminists who study gender, although there are also scholars who adopt a gender focus and do not describe themselves as feminist, as well as scholars who might think of themselves first and foremost as constructivists, Marxists, or liberals (among other options) but who incorporate gender in the framing of research questions or their choice of variables. Although not all scholars adopt a gender perspective, every conceivable topic in IR has a gender dimension. Whether in diplomacy or social movements, international courts or terrorist networks, financial markets or theatres of war, there are **norms** of gender at work. These very often result in disparities between men and women. But to understand how gender structures global politics, we must first unpack some fundamental concepts.

17.2 Sex and gender in international perspective

Our world is divided, almost equally, into men and women. This much appears obvious. With the exception of intersex conditions—when a person is born with characteristics that are not clearly designated as male or female—practically everyone is identified (by medical practitioners, parents, and family) as a boy or a girl within their first minutes of life, and indeed often before their birth. It is usually impossible to leave hospital without a birth certificate, so designation as one or other side of this binary (male or female) becomes a precondition for official recognition as a person. This first attribution of a given, permanent, biological identity conventionally follows us throughout our lives. We grow up from boys and girls into men and women. Sexed difference becomes more pronounced during puberty and, for very many people, capacities that stem from primary sexual difference (such as the ability to become pregnant) become crucial aspects of their adult selves. Because men and women have some differing physical characteristics, it is easy to think of cultural, social, economic, and political asymmetries between them as stemming from an original biological division.

But these commonplaces about gender inequality are mistaken. When we think about appropriate ways to be a man or woman we are not obeying the rules of genetics, but those of society. Masculinity and femininity are granted a certain range of permissible values, and we all learn those values as a precondition for fluent social functioning. Feminists and scholars of gender have often distinguished *sex* (biological characteristics, primarily genital and reproductive) from *gender* (the social codes that express masculinity and femininity). But this distinction may in turn be challenged, since what we understand as the original division between male and female is also historically variable, shaped by sexist assumptions, and transformed by new forms of medical and biological categorization (Rubin 1975; Butler 1993; Repo 2013). The crucial point is that, although our sexual inheritance is in some sense an element of who we are, it is the expression and contestation of our gender that establishes our recognized personhood. Gender has for this reason been called 'the social institutionalisation of sexual difference' (Okin 1998 [1991]: 116) and 'a socially imposed division of the sexes' (Rubin 1975: 179). Gender studies is so often concerned with the distinction between men and women because this is a basic way in which societies manifest gender codes. But it is far from the only way, and the precise meaning of 'man' and 'woman'—as well as the spectrum of non-binary identities—are today at the heart of gender studies. Understanding gender means analysing how masculinity and femininity are **socially constructed** and experienced, while always being conscious that they are not reducible to the dichotomy of a sex binary.

The feminist Kate Millett argued that gender deeply shapes *temperament* (our personality and how we display it), *role* (what kind of activities we are assigned, or are

deemed appropriate for us), and *status* (our importance and influence with others) (Millett 2000 [1969]: 26). From private to public, gender is a manifestation of political power because it affects who gets what. Norms and **practices** of gender result in reward, privilege, celebration, and comfort, or conversely in shame, rejection, expropriation, and exclusion. Society is organized in relation to, and stratified by, gender.

Whatever physical differences may exist on average between men and women are elaborated by structures of gender, which can both extend and limit initial tendencies. Across the world, gender norms influence whether a child is born or aborted; what kind of food people eat as they grow; how they develop and use their muscles and limbs, and hence how they move and comport themselves; what interests they are encouraged to pursue; who they are allowed to befriend; what they are allowed to wear; where they can go to the toilet; how they are encouraged to speak and act in company; what kind of education they enjoy (if they are permitted education at all); what work they are given in the home; what they are expected to provide financially for their family or community; their responsibilities as citizens; whether they are recognized by the state as having a gender at odds with that assigned at birth; when and how they can be seen in public; whether they are allowed to drive cars; what sporting events they can compete in, or attend; whether their sexual orientation is celebrated, permitted, or even recognized; who they can marry, partner, or enjoy intimacy with; how they worship; how and when they are allowed to use violence in everyday life; how and when they will be expected to use violence in service of their community; whether they fight in the name of their state or nation; the commemoration (if any) of their sacrifice; whether they are expected to use their body for other ends (such as to produce children); whether and how they are written about in history books; and what others will assume about their motives and identity after their death.

Crucially, the meaning of gender behaviour varies according to time and place. In some moments it appears fixed and practically without challenge, while in others it may be highly contestable and fluid. Consider the ideal of leadership. In recent history, to speak of a leader has usually been to speak of a cisgender man, and of characteristics (rationality, strength, courage) strongly associated with masculinity. By any reasonable measure, male leaders continue to dominate global politics (**see Box 17.1**). Highly successful women

are compelled to work with or against masculine standards. In the 1970s Margaret Thatcher, who went on to become the first female prime minister of the United Kingdom, took coaching to lower the pitch of her voice. Nothing changed in the quality of her mind or her political ideology, but approximating 'masculine' speech helped her overcome the negative connotations of femininity (such as emotionality and shrillness) in the minds of the electorate. Other female leaders, such as Indian Prime Minister Indira Gandhi and Israeli Prime Minister Golda Meir, were also seen in their time as expressing manly characteristics. Meir was even referred to as 'the best man in the government' by then Prime Minister David Ben-Gurion when she was Minister of Foreign Affairs.

Of course, gender does not work in isolation. At every point, gender combines with other structures of power such as race, class, or nation (**see Chs 18, 16, and 31**). What opportunities and obstacles individuals face, what freedom and violence, depends not just on their gender, but on many other factors. The interaction of different structures of power mean that there are always multiple and complex positions of political authority, subordination, and resistance to consider. In some guises, feminism has stressed that all women are excluded and exploited by **patriarchy** (at its simplest, the rule of men) in much the same way. Others have argued that particular groups of women experience simultaneous and cross-cutting oppressions which *exceed* gender. In societies which institutionalize both

racism and sexism, gender alone cannot account for what happens to those also marked as part of a denigrated racial group. The feminist and legal scholar Kimberlé Crenshaw observed such a process at work in how the court system in the United States treated claims of discrimination. When a group of Black women were fired from their jobs at the car manufacturer General Motors in the late 1970s, it was ruled that they could bring a case either on the basis of racial discrimination or sexual discrimination, but not both. Yet the women's claim was that they had been dismissed on both grounds: not just as women (since white women continued to be employed) and not just because of anti-Black racism (because Black men were still eligible for some jobs). Because domination could not be understood by reference to just a single axis of power, Crenshaw argued that those committed to redressing injustice needed to think of combined harms and their **intersectionality** (Crenshaw 1989).

Intersectionality can be observed in global politics in the contrasting degrees of security for citizen and immigrant women accessing domestic violence shelters, in the homophobic policies that prevent male survivors of sexual violence from seeking medical help in refugee settings, and in the relatively privileged position of white feminists writing from universities in the **Global North** (Crenshaw 1991; Sivakumaran 2005; Ackerly and True 2010). So gender matters because the masculine/feminine categorization is key to the operation of political power, but it is at the same time a distinction traversed by other hierarchies. The gendered histories of discrimination, violence, education, empowerment, trade, diplomacy, democracy, and love (to name but a few)

are global. They take place across physical borders, in the interaction of different political communities, and in the imagination of the foreign and the familiar. Hence the adaptation of the feminist slogan 'the personal is political' to 'the personal is international' (Hutchings 1994; Enloe 2014 [1989]). Gender is personal, political, and international (**see Box 17.2**).

Key Points

- Gender is more than biological sex, against which it is often contrasted. Gender usually refers to the social codes that express ideals of masculinity and femininity.
- Just because gender is constructed does not mean it is imaginary. It has the force of a fact because we behave as if it is a fact. So gender also includes the practices and behaviours that express and enforce social codes.
- Gender is a structure of power because gender norms and gendered behaviours are the means by which some people receive benefits, while others suffer harms.
- Gender does not exist in isolation. It intersects with other forms of power in complex ways.

Box 17.1 Gender and political leadership

- Number of women national leaders (heads of state or government) out of 193 states: 24 (12 per cent)
- Percentage of women in parliaments (global average, 2021): 26 per cent
- Highest percentage of women in parliament (2021): Rwanda, 56 per cent
- Lowest percentage of women in parliament (2021): Micronesia, Papua New Guinea, Vanuatu, Haiti, 0 per cent

Source: Data on women as heads of state or government taken from UN Women (2021b), correct as of 1 September 2021. Where the same woman is both head of government and head of state this has been counted as a single position. Only elected heads of state are included. Data on percentage of women in parliament taken from the Inter-Parliamentary Union (2021), correct as of 6 December 2021. A 'parliament' is treated as the percentage across lower and upper chambers where a bicameral legislature exists.

17.3 Global gender relations

Patriarchy is one possible way of describing gender regimes, but there is disagreement as to the term's precision and application. It has been argued that patriarchy is too static an idea to describe the diversity of **gender relations**, and that it does not sufficiently incorporate questions of intersectionality. One recurrent issue in the debate has been about how best to characterize men's experiences of gender. While many consider feminism compatible with a subtle and critical analysis of men and masculinities, others have suggested that feminism is hindered by its historical focus on women's experiences (Jones 1996). Scholars who do not identify as feminists, or who see feminism as primarily an activist rather than

a scholarly identity, describe their work with such terms as 'gender studies', and 'critical masculinity studies'. The field of gender studies, as its more neutral name implies, is less likely to consider explicitly political questions of emancipation, and somewhat less likely to focus on the experiences of women alone, even though gender scholars may frequently identify patterns of power and domination, and even though there are feminist scholars who study men and masculinities in great depth. In short, while all feminists study gender, not all scholars of gender are feminists, or feminists of the same tradition.

Because gender is organized through diverse, malleable, and contested social norms, it is best understood

not as the property of specific persons but as the interaction of concepts and practices in context. Ideas about gender, and alternative ways of organizing gender roles, come into contact with one another across borders. In any given social situation, 'masculinity' and 'femininity' are clusters of social codes that exist in relation to each other. It has often been observed, for example, that being masculine is not so much about an exacting list of features as it is about appearing suitably *not feminine*. On this account, gender is not a fixed essence, but the meaning given to behaviour, the continual counterposing of masculinity and femininity. Given the importance of intersectionality, we can expect different groups of women to be attributed various characteristics in gendered terms. These might be ideas of motherhood, sexual availability, intelligence, vulnerability, suitability for domestic work, and so on, all cast in relation to a series of contrasting ideas about masculinity. Yet masculinity is not just or always the dominant side in an equation with femininity. Masculinity is also a way to understand the relationships of power that exist *among* men, and some of the ways in which gender norms can harm them.

In the succinct phrase of Terrell Carver (1996), gender is not a synonym for women. Men both have and perform gender. The most widely adopted framework for understanding how masculinities regulate the behaviour of men is that of hegemonic masculinity (Connell 2005). In developing this concept, R. W. Connell argued that in any gender regime, there will always be a version—an ideal—of masculinity that is dominant in so far as it represents the qualities that most men (and many women) celebrate. Because its elevated status is given value according to a kind of social consensus, this version of masculinity is called hegemonic. Although, like all gender constructions, the exact shape of hegemonic masculinity depends on context and historical period, a stereotypical example of hegemonic masculinity from the last decades might include traits associated with heterosexuality or straightness, whiteness, athleticism, wealth, rationality, fatherhood, military service, and patriotism (**see Box 17.3**). And hegemonic masculinity travels. To take just one contemporary manifestation, religious or cultural groups opposed to homosexuality or queerness collaborate across borders to influence domestic politics, as do movements for greater **LGBTQI** rights (Rao 2014). In this sense, ideas of masculinity and femininity flow, cascade, and fail in international society, just like ideas of national security, human rights, or financial

---

Box 17.3 What is masculinity?

While men may think that genitals are literally and symbolically central to masculinity, they are mostly not on display, and not that often tested or inspected. Rather they are merely referenced through attire, metaphor, and bravado. Thus, masculinity not only works to confer power on men over women, but also to empower masculinized individuals and groups over feminized ones, and to create power hierarchies of men over men, as well as some masculinities over others.

(Carver 2014: 115)

---

governance (Picq and Thiel 2015). Indeed, gender is always to some degree *a part of* ideas such as national security, human rights, and financial governance.

Almost no actual men fit every aspect of the hegemonic masculine ideal. It is something that is aspired to, a mirage. Hegemonic masculinity is distinguishable from other forms of masculinity that exist in the same gender system. *Complicit* masculinities are those that benefit from association with the hegemonic model even if they are not themselves dominant. For example, men might praise the symbols of the military, and express strongly pro-military opinions, without being able to pass military fitness tests themselves. *Subordinate* masculinities are subject to mockery, dismissal, or discrimination in relation to the hegemonic ideal, seen as its opposite. Men who exhibit the characteristics of subordinate masculinity are excluded, and unlikely to reap the full benefits of membership in male groups. Until recently, homosexuality was considered a subordinate form of masculinity in societies that either formally or informally discriminated against gay or queer men (as many continue to do). Finally, *marginalized* masculinities are those that are denied the status of the hegemonic ideal because they overlap with other structures of exclusion. Immigrant or minority men may be recognized as having some of the attributes of hegemonic or complicit masculinity in the society they have emigrated from or in the minority group of which they are a part, but they will not be accepted into the privileged circle of men so long as their existence is seen as a threat to national, racial, or communal identities. The place of masculine identities fluctuates in part based on the political structure of a society.

Just as 'women' is not a unified category, but can be subdivided according to different located experiences of gender and intersections, so too masculinity refers to a variety of temperaments, roles, and statuses, to the extent that many scholars, such as Connell

---

(2005), Carver (2014), and Hooper (1998), refer to *masculinities* in the plural. As the example of subordinate masculinities suggests, expressions of sexuality play a central role in distinguishing gender status. In some respects social attitudes to both heterosexuality and homosexuality have changed considerably across the world in the last hundred years. Relevant changes include shifts in the legal status of same-sex or queer intimacy (often towards decriminalization, but sometimes towards criminalization); the growth and spread of gay rights and LGBTQI social movements; fears over the influence of homosexual or queer behaviour in some religious, cultural, and political constituencies;

greater recognition of a diversity of norms of homosexual masculinity and femininity, as well as growing awareness of **genderqueer**, transgender, and non-binary identities; diversification in media depictions of LGBTQI lives; changes in attitudes towards premarital sex in heterosexual or straight relationships; and a decline in racist beliefs about **miscegenation**. In recent years, 'populist' right-wing movements from Hungary to Brazil to the United States have arrayed themselves against **trans** rights, seeking to frame trans people as a threat to the family, Western civilization, and even feminism itself (Ahmed 2016; Korolczuk and Graff 2018).

Key Points

- Gender studies is not the same as feminism, although they are closely related historically and conceptually.

- Gender is relational. The meanings of masculinity and femininity are not fixed, but established in interaction and contrast with each other.

- Gender is multiple. It means more than 'male' or 'female'; there are always various possible ways of being masculine or feminine, depending on the gender order in place.

- Gender changes over time, at least in part due to political struggles over what it means and should mean.

17.4 Gendering global politics

Recall the stark disparity in the proportion of women to men in positions of political leadership found in virtually every country. According to the latest available data from the Inter-Parliamentary Union, in only five countries do women account for 50 per cent or more of the representatives in the lower or single chamber (Rwanda, Cuba, Nicaragua, Mexico, and the United Arab Emirates) (Inter-Parliamentary Union 2021). On a common understanding of what it means to holds power, it is therefore clear that politics is gendered. Overturning the historical exclusion of women from the political process has been a central theme in decades of feminist scholarship (Fraser and Honneth 2003). This inequity has also been acknowledged repeatedly by states in the highest forum of global governance: the United Nations (see Ch. 21).

In 1975 in Mexico City, following mobilization by a global coalition of feminist civil society, the United Nations convened the first World Conference on Women, an official intergovernmental summit to respond to the multiple dimensions of gender exclusion, from differences in wages and economic autonomy to women's role in achieving peace. It established a

special United Nations Development Fund for Women (UNIFEM, subsequently amalgamated with other entities to become UN Women).

Mexico was followed by conferences in 1980 in Copenhagen and in 1985 in Nairobi, the latter since dubbed the 'birthplace of global feminism' due to the number of non-governmental organizations present and the global collaboration among feminist groups. The World Conference on Women in Beijing in 1995 gave its name to the Beijing Platform for Action, a list of demands for women's inclusion which serves as a benchmark of progress to this day. Five years later, the UN Security Council passed Resolution 1325, seen as a breakthrough because it finally raised a cluster of issues—participation in decision-making and conflict resolution, the inclusion of a gender perspective in peacekeeping and humanitarian contexts, and the prevention of violence against women and girls—at the highest level of international politics. The successful passage of Resolution 1325 inaugurated what is now known as the Women, Peace and Security (or WPS) agenda (see Davies and True 2019).

By the early 2020s, there were ten Security Council resolutions in the WPS series, each reiterating or deepening the commitment to gender equality and to ending conflict-related sexual violence. However, the results of **gender mainstreaming** are open to debate. While significant strides have been made in some areas (such as extending primary education, reducing infant mortality, and following up the treaty obligations of the 1979 Convention on the Elimination of All Forms of Discrimination Against Women) (**see Box 17.4**), progress has been slow in many others. There is also a sense that an early stress on multiple aspects of women's exclusion (including measures of economic

---

Box 17.4 Gender milestones in global governance

1975: The first United Nations World Conference on Women is held in Mexico City.

1976: UN 'Decade for Women' begins.

1979: The UN General Assembly adopts the Convention on the Elimination of All Forms of Discrimination Against Women (CEDAW). 189 states would go on to become parties to the Treaty.

1980: Second UN World Conference on Women, Copenhagen.

1985: The third UN World Conference on Women, held in Nairobi, closes and reviews the UN Decade for Women.

1995: The fourth UN World Conference on Women, held in Beijing, puts forward the Beijing Platform.

2000: The UN Security Council passes Resolution 1325, inaugurating the Women, Peace and Security (WPS) agenda. 'Beijing + 5' meetings are held in New York. The Millennium Development Goals (MDGs) include specific gender-related goals to be achieved by 2015.

2008–19: Nine more Security Council resolutions are passed, extending the WPS agenda.

2014: The United Kingdom hosts the Ending Sexual Violence in Conflict summit in London. UN Women launches the #HeForShe campaign to encourage men to support gender equality.

2015: Countries follow up the MDGs with Sustainable Development Goals (SDGs), including the achievement of gender equality.

2020: The UN Security Council fails to pass a new WPS resolution on the twentieth anniversary of the first, due to opposition to a Russian draft widely seen as undermining women's rights.

---

and political equality) has been eroded in favour of a narrower agenda of violence prevention in conflict settings, which has the effect of continually casting women in the role of victims to be saved rather than as equal participants alongside men (Kirby and Shepherd 2016) (see Case Study 13.2). The legacy of UN activism has also been criticized for its simplistic operationalization of gender as a male/female dichotomy without attention to the complexities of gender and sexual identity.

Whatever their impact, these policies are evidence of the much greater visibility of gender issues in global politics compared with even a few decades ago. There is no area of international political life where gender disparities do not feature, and at the same time no level of analysis is free of gendered associations. And it is possible to trace this gendering of politics even in the basic unit of analysis of IR: the state itself.

The modern nation-state is more than a territorial unit of rule, dividing those within it and under the nominal protection of its government from those without. The very idea of the nation-state is thoroughly gendered. The frontispiece of Thomas Hobbes's *Leviathan*—perhaps the most famous treatise on the state in all of political theory—shows the body of the sovereign as male, comprised of the people, all apparently also male (Carver 2014). A masculine symmetry is thus established between the aggregate of male citizens, an individual male king, and a 'male' political entity (the state). In addition to such depictions, the very language for describing what happens within a state ('domestic') is a reflection of the division between public and private space, and a long tradition in which male citizens inhabit the public realm while women and children are located in the home.

Yet the representation of the nation is not exclusively masculine. Queens have similarly stood symbolically for the whole political community and commanded accordingly (Towns 2010). The nation appears historically as both Fatherland and Motherland, gathering legitimacy in affinity with the family unit and thereby naturalizing political hierarchy (Collins 1998). Gendered metaphors of loyalty to the state vary, but feminist political theorist Jean Bethke Elshtain has argued that they tend towards one of two gendered ideals. The first is 'the beautiful soul', an image of virginal womanhood in need of protection from foreign invaders. Men, by contrast, are encouraged to take on the role

of 'the just warrior', who goes to war in defence of the homeland (Elshtain 1995 [1987]). Everyone negotiates gendered loyalty to the state.

Although this stark binary between warrior men and domestic women may appear antiquated, states continue to represent themselves, and to be imagined by their populations, in gendered terms: as having certain kinds of ideal citizens and ideal values. The body of the strong nation is stereotypically masculine—muscular and heterosexual—and colonialism, occupation, revolution, and national interest are frequently conceptualized through metaphors of manly resistance, feminine submission, and heterosexual virility (C. Weber 1999). Strategies of foreign policy, although obviously carried out by complex combinations of institutions and agents, have always been easily represented by gendered figures. This is obvious in the visual shorthands of political caricature, as in an example from *Puck* magazine in **Fig. 17.1** which depicts the 1898 United States intervention in Cuba. Populations in apparent need of defence are shown in feminine form, while their defenders (or pretenders to defence) appear upright and stereotypically masculine. The aggressors, unsurprisingly, express the less attractive features of subordinate or marginal masculinity, at least so far as the intended audience for the caricature was concerned.

Since the project of state-making depends so heavily on an idealized gender order, the existence of LGBTQI people with a different understanding of the nation can be deeply unsettling (Berlant and Freeman 1992). Their desire either to enter areas of public life from which they have previously been excluded, or indeed to reshape national politics to better include their interests, are consistently resisted in many different countries.

Governments regulate sexuality and gender identities in part because they see **dissident sexualities** as a threat to social cohesion. As late as 2010, the United States prevented non-citizens living with HIV/AIDS from entering the country, a ban reflecting historical homophobia and deeply linked to fear of contamination from sexual others, not just of the individual bodies of US citizens, but of the 'body' of the state itself (Frowd 2014). Indeed, the very mechanisms of border passage are gendered. In most countries, it is necessary to state one's gender (male or female) for any official form. Until very recently, states have simply been

Figure 17.1 'Save me from my friends': illustration from *Puck* magazine
Source: *Puck* magazine, 7 September 1898. Image courtesy of Library of Congress.

unable to recognize the existence of persons whose gender identity does not conform to a binary choice (in some countries—such as Nepal and Germany—there is now a third gender category on passports). For **trans** persons, winning recognition by the state is a chronic struggle, heightened whenever crossing international borders (Currah and Mulqueen 2011).

Official systems of discrimination on the basis of sexuality or gender identity, although implemented domestically, reflect the *global* politics of gender. A significant percentage of anti-sodomy laws in existence today are colonial laws retained by newly independent nations (Human Rights Watch 2008). Comparative research suggests that Britain's former colonies are more likely to criminalize homosexuality today than the ex-colonies of other powers (Han and O'Mahoney 2014). The analysis of which 'cultures' are homophobic is therefore inseparable from an understanding of international patterns of dominance and resistance in the nineteenth and twentieth centuries. It has even been argued that the term 'homosexuality' cannot be understood in isolation from imperial history (Massad 2007). Some countries that now pride themselves on tolerance and gender equality justify their military actions on the grounds that they are more civilized than their enemies. In recent years, the combination of gay rights discourse and **militarism** in the US and its allies' invasion of Afghanistan and Iraq has been termed **homonationalism** (Puar 2008). Gender and sexuality thus shape the politics of violence as much as they do the politics of everyday life.

17.5 Gendering global security

The discipline of International Relations has usually seen national security in abstract terms: states with different levels of military, economic, and political power interact as separate entities. In the conventional reading, war is the result of state leaders seeking to maximize their relative power in the international system; exploiting the opportunity provided by a weaker party; miscalculating their national security interests; succumbing to the undue influence of domestic interest groups; acting as part of a collective security agreement; or some combination thereof. Gender scholars are not, on the whole, interested in such hypotheses. Instead, they ask questions about what role masculinity and femininity play in the practice of war (see **Case Study 17.1**), who counts as participants in war, and how to conceptualize war and security.

The stereotypical representation of the soldier is that of a man, and warrior identity is often included as an element of hegemonic masculine ideals. Gender and feminist scholars widely accept that masculine ideals are historically central to the training of warriors (see **Opposing Opinions 17.1**). Military training regimes frequently stress the loss of feminine qualities and the enhancement of masculine—even **hyper-masculine**—ones (Belkin 2012). Constructions of military masculinity are thought to be so important because good soldiering is not the natural behaviour of biological men, but involves a series of capacities (to cooperate in a unit, to obey orders, to respond effectively to danger, and to kill) that have to be *made*. In addition to denigrating feminine characteristics, some professional militaries have only recently allowed openly gay people to serve. Most famously, the US military long operated a policy known as 'Don't Ask, Don't Tell' (DADT), for fear that sexual orientation would undermine the armed forces and therefore potentially threaten the survival of the

Case Study 17.1 The Kurdish Yekîneyên Parastine Jin (Women's Protection Units)

Yekîneyên Parastine Jin fighters
© Kurdish Struggle / Flickr

Women have been active participants in political violence in numerous conflicts. Close to a million women fought as partisans or in the Soviet army during the Second World War (J. Goldstein 2001: 65). Women have since been guerrillas in the El Salvadoran, Peruvian, and Sri Lankan civil wars, suicide bombers in Lebanon, and combat troops in the US army (see, e.g. Kampwirth 2004; Mackenzie 2012). Female fighters were again present—and arguably visible as never before—in the multi-fronted war against the so-called Islamic State from the mid-2010s on.

During the internationalized civil war in Syria, an autonomous Kurdish polity was established in the north of the country across three cantons known as Rojava. The area has been called a 'stateless democracy', significantly associated with the Partiya

Yekîtiya Demokrat (PYD, or Democratic Union Party). The revolutionary politics of Rojava emphasize gender equality as integral to Kurdish independence, contrasting sharply with the extreme misogyny and sexual violence of the parallel state-building of the so-called Islamic State (Kaya 2020; Şimşek and Jongerden 2021: 1034–40).

From 2013 mostly Kurdish women warriors organized separately as combat units, known as the Yekîneyên Parastine Jin (YPJ), fighting alongside the mixed but majority-male People's Protection Units (YPG) (Szekely 2020: 415–16). Their strength has been estimated to be as high as 24,000 fighters (Macintyre 2021). The YPJ attracted volunteers from abroad, drawing comparisons with the International Brigades of the Spanish Civil War, and were heavily profiled in Western media, including in a photo essay for the magazine *Marie Claire* (Griffin 2014). Their celebration as 'badass' has also been taken as reflecting a shallow voyeurism that did less to recognize Kurdish women's political agency than to flirt with Orientalist tropes (Toivanen and Baser 2016; Şimşek and Jongerden 2021). At the same time Kurdish independence groups have courted international attention to build diplomatic and military support for Rojava, and states like the United Arab Emirates have publicized the role of women in their own militaries to signal their opposition to the so-called Islamic State (Szekely 2020).

Question 1: What does women's participation in political violence tell us about gender norms?

Question 2: Are propaganda representations of women fighters as important as their military successes in contemporary war?

Opposing Opinions 17.1 War is inherently masculine

For

Historically, virtually all soldiers have been male. Women have very rarely contributed to combat forces in significant numbers. This is true over great periods of time and across many societies that differ in other respects, strongly suggesting that there is something that closely bonds men, masculinity, and war, for good or ill.

Male physiology is well suited to war. Men are on average physically stronger than women; they are also differently wired. Testosterone and other hormones associated with violence are higher in men than women, and moreover are highest at the age when professional armies recruit most heavily—roughly between 16 and 30 years old (J. Goldstein 2001: 143–58). The combination of greater physical aptitude and evolutionary heritage creates a permanent bond between men and violence.

The military is a special kind of institution. Even if historical and biological considerations can be overcome, the armed forces serve a distinctive social function. The task of the military is not to represent a population fairly, but to protect it effectively. Militaries work best when they are made up of units of men ('the band of brothers') prepared to make great sacrifices for each other. Regardless of whether women have the ability to serve on equal terms, preserving military cohesion must be the pre-eminent consideration, even if that means indulging the prejudices of male soldiers.

Against

The historical record is neither neutral nor exhaustive. Women soldiers may be relatively rare, but it does not follow that only men can wage war. Close to 300,000 women served with the US military in the Afghanistan and Iraq wars alone (MacKenzie 2012: 32), and many more were involved in combat—officially, unofficially, and in disguise—throughout the twentieth century (see Baker 2018). There are many examples of women warriors which disprove a universal rule (Alpern 2011; Mackenzie 2012; Ortega 2012; Darden, Henshaw, and Szekely 2019). Where women have been formally forbidden from joining armies, their absence from battle does not prove that they cannot be effective soldiers. They have simply not been given the chance.

Assumptions about the violent nature or physical superiority of male bodies are deeply flawed. Testosterone does not play an uncomplicated or unmediated role in enabling violence. Women are only now being allowed into the most gruelling training courses; it is misleading to extrapolate from the failings of a few innovators (the first women to ever attempt courses of this kind) to a judgement of women's physical capabilities in general. Male bodies fail too, and female soldiers have already completed many advanced military training programmes.

Militaries are complex institutions undertaking complex missions. Many military tasks are better suited to intelligence and situational awareness than to raw physical strength. Professional militaries have integrated women on a greater scale in recent decades precisely because women offer skills that their male colleagues may lack (Azarbaijani-Moghaddam 2014; Dyvik 2014). Studies have shown that the hyper-masculine culture distinctive of modern militaries may in fact hamper cohesion and reduce mission effectiveness. Diverse militaries are stronger militaries.

[1] How much should the long history of war matter in deciding who can take on what roles in modern militaries?

[2] Do new military gender roles suggest that war in the future will be very different from the past?

[3] What role do you think physical characteristics should play in deciding who fights?

Visit the online resources to discover pointers to help you tackle these questions.