

# Polar Stars

Why the Political Ideologies  
of Modernity still Matter



Mauro Barisione



Milano University Press



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## Preface and acknowledgements

On New Year's Eve a few years ago, while I was in Tokyo for a visiting fellowship, I received an email from a former student of mine at the University of Milan inviting me to give an evening talk on the conservative political culture at a progressive youth association in L., a small town in the Milan region. Incidentally, a year later L. would be the first epicentre of the Covid-19 pandemic in the Western world. I accepted the invitation, because it was an opportunity to return to a topic on which I had worked in the past, and for the pleasure of interacting in a non-academic environment with politically motivated young people. Moreover, the signs of a radical conservative new wave were multiplying in the domestic politics of several countries around the world. The theme was so broad that I prepared the lecture for a month. But on the day of the talk, we were informed that the conference venue would be closed that evening due to force majeure, so the meeting was cancelled.

This incident, however, was only the beginning of a longer, and more enjoyable, intellectual journey. For two years, I continued to do research, read, take notes and devise interpretative lines concerning the history and philosophy of conservatism. The further I went, the more I realised that a sociological work on the constitution and historical development of a conservative ideology, up until its contemporary forms, could only be conducted by taking account of its continuous relations, both of opposition and of exchange, with other political ideologies, primarily liberalism and progressivism/socialism. Thus, during those years my research encompassed the entire 'ideological field' and the relations of mutual differentiation and influence of the main ideological matrices in modern and contemporary history. This led me to realise, among other things, that populism, for instance, is too important an issue to be left to populism experts alone, if they fail to analyse it within a system of relations with other political and metapolitical ideologies.

I originally planned to write a short non-academic essay to show how these modern ideological matrices are more useful than the simple left/right dichotomy for understanding 21st-century politics. The idea of an academic essay not only implied, obviously, a much longer and more

demanding commitment; it also threatened to distract me from other ongoing research projects and from the positions I had unwisely agreed to take in recent years. During that very peculiar period of my professional life, in fact, I happened to coordinate the PhD programme in sociology and methodology of social research of the Universities of Milan and Turin and, at the same time, to be the director of Pomlab, a department laboratory on public opinion and social media, while I was also the president of the Itanes (Italian National Election Studies) research programme. That was a mental workload sufficient to warrant the publication of absolutely no research articles, let alone books, for years to come.

When the opportunity arose to publish a book with the nascent Milano University Press, also on the encouragement of Enzo Colombo, the editor of the series for the sociology and political science area, I threw myself into it with – once again imprudent – enthusiasm, also because in the meantime my term as PhD director had come to an end. There were, however, no more excuses: the project was to take a much more comprehensive form. I thus set off on an intense research path that ranged from a sort of qualitative analysis of original political and philosophical texts, always conducted as closely as possible in relation to the historical, social and political contexts of their production, to the quantitative analysis of a dozen different datasets – from digital text data to survey and macro data – that will be more accurately listed in the introduction.

Moreover, I produced with my department's Lab an original dataset with which to explore possible applications of the theoretical framework of the book to the analysis of the ideological orientations of voters, as well as their relations of proximity or distance with respect to contemporary party families in various European countries. Overall, however, I consider the sort of 'ethnography of the ideological field' that I have relentlessly conducted for nearly four decades of my life to be the prerequisite for the elaboration of categories and hypotheses that could possibly orient my research in a theoretically more meaningful manner.

In short, although at first glance it may seem so, this book is anything but a text on political philosophy or a handbook on the main modern political ideologies. On the contrary, it is a study of political sociology, perhaps a slightly heterodox one, which seeks to combine development of an original theoretical proposal with attention to empirical 'data' – including texts – of

a philosophical, historical or social nature, examined as much as possible in their recursive interaction. Rather than a static classification of ideological forms, it aims to provide a dynamic framework for the analysis of ideological directions and hybridisations that are present in virtually all individual orientations or collective political decisions.

If there is a normative message implicit in this book, it consists in the invitation to always try to recognise – with a formula – “the positions behind the ideas and the ideas behind the positions”. In the former case, it is a question of understanding what ‘objective’ social positions – from which certain dispositions, interests and values tend to spring – are at the basis of the ideas expressed by the actors in the ideological field. Becoming more aware of the social origins of the ‘daemons’, as Max Weber called them, which hold the threads of political actions – including ours – would be an exercise in objectification also useful for preventing any totalitarianism of thought, such as that which often animates digital bubbles in contemporary social media platforms. In the latter case (“the ideas behind the positions”), it is a question of grasping the profound ideological implications and consequences of the positions and decisions taken by the actors, sometimes concealing – or they themselves not recognising! – the ideological nature of these ideas behind the appearance of political or technocratic pragmatism. Setting this dual objective – to recognise the social genesis of each idea and the ideological corollaries of each position – is almost a form of ‘social-epistemic activism’ which I believe can only be healthy for democratic life.

Besides my intellectual debts to Max Weber, I must acknowledge those to Karl Polanyi, whose famous 1944 book was an important source of inspiration for the idea of the ‘double movement of modernity’ that I have developed in this book; and to Pierre Bourdieu, whom I have read with passion – and with an equally critical spirit, sometimes using ‘Bourdieu against Bourdieu’, as he himself would have said – since I was able to attend his lectures at the Collège de France, in 1998, at the beginning of my PhD in Paris. And, speaking of Parisians, I concede that Thomas Piketty’s work, with its obstinate intellectual and research attention to the structure of wealth and property, especially in the monumental *Capital and Ideology*, has possibly left some traces in the theoretical proposal of this book.

The human and intellectual debt of this work, however, is owed to the scientific environment in which it was conceived: the Department of Social and Political Sciences of the University of Milan, in which I have grown up academically since the early 2000s and which over the years has become a reference for this field of study, in Italy and also internationally. It is here, incidentally, that two extraordinary scholars, Alessandro Pizzorno and Alberto Melucci, developed, from different theoretical angles, a notion – that of ‘collective identity’ – which I consider to be a precious legacy. I am proud to be the first representative of this department to publish for Milano University Press, in the hope that it will grow and establish itself as an international scientific publishing house.

It is therefore my department’s colleagues and friends with whom I communicated during the writing of this book that I want to thank, even in cases where I am guilty of not having taken their wise comments into account: Roberta Sassatelli, Luca Bellocchio, Ferruccio Biolcati, Lorenzo Mosca, Luigi Curini, Manlio Cinalli, Beatrice Magni, Andrea Ceron, Alessandro Gandini, Sergio Splendore, Paola Mattei, Cristiano Vezzoni, Flaminio Squazzoni, Anne-Marie Jeannet; but also brilliant younger scholars who gave me feedback such as Guido Anselmi, Federico Vegetti, Silvia Keeling; and other colleagues and friends who have been part of this department or who are in the Sociology PhD programme: Dario Tuorto, Giovanni Semi, Mario de Benedittis. No doubt many other colleagues would have had much to say about this project, if only we could have met during the pandemic. I would also like to thank Elio Nasuelli, editorial manager of Milano University Press, for his rigorous and careful assistance. My thanks also go to the two anonymous reviewers who allowed me to remedy some limitations of the work before it was fully completed. And, of course, I wish to thank my ex-student from the town of L., where I will give my lecture on conservatism someday!

Outside academia, thanks to Stéphanie, for being right outside the delivery room of this book.

I dedicate this book to our son Simon, the youngest of my polar stars.

## Introduction

An assumption of this book is that we have long thought that political ideologies were over and that we had entered a *post-ideological* era. Put briefly, this was due to the structural changes of contemporary societies, the end of bipolarism in international politics, and the achieved supremacy of a market economy within the framework of liberal democracy. The ideological compass of ‘left’ and ‘right’ had been reduced to discerning those in favour of new forms of cultural liberalism from those who prioritised law and order, while both tended to converge on the primacy of the markets over a state-directed economy.

However, the new millennium has brought – along with remarkable technological innovations, particularly in the field of digital communications – disruptive events in the form of global terrorism, ‘wars on terror’, financial collapses, economic recessions, de-democratisation, new world powers, migratory flows, protest movements, and pandemics. New autocrats have arisen; politically extremist leaders and forces have gained power through astonishing election outcomes; a dense array of social movements have occupied the streets of cities and digital squares across the six major continents; and social media platforms have accumulated unprecedented power as the providers of the new spaces for public opinion formation, social activism and political communication.

In this ‘hypermodern’ world, the *ideological field* – the social space made up of all the individual and collective actors exercising some communication power over the formation and dissemination of political-ideological messages and symbols – is teeming with people, groups, ideas, action, conflict. Each of these actors has a vision of the world as it is, a set of clear-cut preferences about how it should be, an affective attachment to a group, an identified enemy and a propensity for political action: in a word, an *ideology*, at least as defined in this book. Hence, we undoubtedly live in deeply ideological times – an ‘era’, as we might be tempted to call it, that comes *after the post-ideological*.

But instead of proposing a typically ‘best-selling’ idea – that this era is ‘new’ and, as such, sweeping away all that is old, boring and useless – I will argue that this new ideological period is, in fact, firmly inscribed in the logic

of *modernity*, albeit in a somewhat radicalised form ('hypermodernity'); and that even the alleged post-ideological 'era' was but a period, a temporal interlude, an ideologically less intense declension of this same modernity. So, rather than designing self-proclaimed futurist categories, I will maintain that a deep familiarity with the ideological logic of the last centuries of political modernity is needed to make sense of today's ideological fields. Admittedly, this book is not intended for those who are always eager to fuel the illusion of experiencing exciting novelty, even at the cost of constantly reinventing the wheel.

For this reason, the entire first half of the book will be devoted to an attempt to reconstruct, using primary sources almost as 'case studies' of modern political thought, what can be called the fundamental 'ideological matrices' of modernity. If contemporary politics is still steeped in modern logic, what really matters is not a unique definition and granular description of every ideological tendency that has appeared in the last few centuries. Rather, it is of paramount importance to understand the essential social and political logic of each *ideological matrix* – the original mould or template that constitutes the foundation of a political ideology and the basic imprint for future ideological variants. It is in the original matrices of liberalism, conservatism, and progressivism/socialism, in fact, that we can find the main elements necessary to understand subsequent developments in the forms of ideological radicalisation, hybridisation and adaptation to changing societal environments. (Almost) everything, in fact, is already in the matrices.

These ideological matrices differ from each other right from their origin, in that they pursue ultimate goals – or *polar stars* – fundamentally different from the point of view of how collective life should be organised. In the socio-historical reconstruction proposed by this book, the three main polar stars of modernity were and remain those of *order* – the preservation of a particular political, social and moral order; *freedom* – the affirmation of an ever-expanding range of individual liberty rights; and *equality* – the removal or reduction of specifically socioeconomic inequalities. And even in today's politics, actors either pursue one or more of these polar stars, or objectively tend to follow them when taking political positions and policy directions. In fact, it is into a struggle among these directional goals, or pairs of them, that positions on most political issues can, when considered in their lowest common denominator, be translated. Or, at least, they can be so provided

that there is no confusion between these (*political*) positions that revolve around the organisation of society and other (*metapolitical*) positions that essentially concern the organisation of politics itself. Indeed, it is around the latter that part of the political conflict still revolves in the contemporary world; and while political and metapolitical struggles often intertwine with each other in practice, we shall see the importance of keeping them separate for analytical purposes.

For several reasons that will be illustrated, an approach based on the main ideological matrices with their own polar stars is more satisfactory than the left/right dualism, which is methodologically very convenient but conceals totally different ideological galaxies within its unidimensional axis. But it is also more satisfactory than other political science models that are either too ahistorical or too historically determined by the present times. In fact, the polar star metaphor can be maintained on condition of extending it to the position/trajectory of the observer in the social world (in terms of geocultural area, historical moment and social position), which makes them visible and attractive to very different extents.<sup>1</sup> But even in social contexts in which the three polar stars, or guiding principles, seem to be equally legitimate, what matters is the relative salience of each of them for an actor: the latter's ideological orientation, or the direction of its positioning on any single policy, stems from the relationship it has with the principles of order, equality and freedom, since they are not necessarily mutually exclusive. While a 'pure' ideal-type – in the sense given to the term by Max Weber (1904) – would identify positions characterised, for instance, by an absolute devotion to the principle of order – as defined above – and an equally absolute contempt for the principles of equality and freedom, real ideological types will typically be defined by peaks in the salience of one, or perhaps

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1 The author himself obviously does not escape the principle of the selective visibility of polar stars conditioned by his position in the social world and, even before, in temporal and geocultural space. The theoretical proposal of this book is clearly of Western European derivation, which nevertheless has the specific property of coinciding with the space of the historical genesis of the same modern political ideologies. In other words, a certain Eurocentric outlook in this book draws its legitimacy from the fact that it derives at least as much from the historical nature of its subject as from the geocultural origin of its author.

two, of these principles at the same time, and relatively less emphasis on the other(s).<sup>2</sup>

However, if it is true that we live in deeply ideological times, the paradox is that virtually no one wants to be defined as ideological, or uses ideological categories of analysis, or seems to be aware of the ideological nature of their positions, decisions or actions. To be sure, defining one's political positions as ideological sounds pejorative, and this is far from new.<sup>3</sup> But a still widespread perception also seems to consider ideologies as hopelessly outdated in contemporary politics and societies: the twentieth century is dead and gone, new generations are increasingly populating the world, and only a few individual and collective actors are willing, or even able, to define their positions according to classic ideological categories such as conservative, liberal and socialist, not to speak of the totalitarian ideologies that thrived between the two world wars. It is tempting, in hypermodern digital societies, to think that political ideas can be picked and packed at will, *à la carte* and without commitment on the part of any citizen; and, therefore, that two different positions can be taken on two different themes, always starting from scratch, without having to worry about the possible existence of a logical, if not ideological, linkage between the two.

- 
- 2 In the language of contemporary political science, the principles that we identify as the main polar stars of modern ideologies can function, depending on the socio-historical context, both as 'position' (divisive) and 'valence' (consensual) issues: while in the former case there is a conflict over their own desirability, in the latter the positioning of the actors in the political space is simply defined by a specific combination which stems from their ordered preferences of these principles. In practice, everyday politics takes place in the vast space between the two opposite extremes of ideological warfare and ideological convergence.
  - 3 All the genealogies of the concept of 'ideology' report the judgement of Napoleon Bonaparte, who, in his speeches and letters, discarded as "abstractly metaphysical", "doctrinaire" and "utopian" what others (Destutt de Tracy, 1796) had seen, after the French Revolution, as a new "science of ideas". Napoleon's criticism, however, was not simply intellectual; he also feared what he regarded as the politically dangerous liberalism of the circle of "*idéologues*" around Destutt de Tracy (see, for instance, Kennedy 1979). Later, Marx and Engels's (1846) reference to ideology as "the phantoms formed in the brains of men", to the "illusions of the ideologists" and to "superstructure" paved the way for a still very influential Marxist understanding of ideology as "false consciousness" (Lukács 1923) of the real relations of domination on the part of the dominated class.

Those who agree with the realism of this account do not necessarily find it problematic. Yet a problem arises when each of these positions has, in fact, implications regarding the way or direction in which collective life is, or should be, organised. And, as noted above, these implications are inscribed in broader systems of meanings that have been constituted over centuries of political-ideological modernity – say since the 1640s in Britain on the eve of the English Civil War. In fact, the requiem for the modern world was perhaps held too soon, because our hypermodernity still fully inhabits, as said, the logic of modernity: its political institutions, its economic system, its fundamental values are still fully modern. Thus, there can be no ideological innocence in taking positions associated with larger configurations of ideas and practices that have already been experienced, at least in their fundamental premises, throughout several centuries of political modernity. I will refer to this first problem as the hypermodern difficulty of grasping *the ideas behind the positions*. Political discourses and policy decisions, in other words, often have a well-decipherable ideological direction, which, however, is not properly recognised as such either by their bearers or by third parties.

A second problem, which is specular to the first, is that, while universalistic ideas are continually proclaimed in order to justify positions and decisions concerning political or policy issues, the social particularism of this professed universalism is rarely apprehended as such. This problem is, admittedly, inherent to the ideological logic of modernity: modern values such as reason, freedom, equality, and justice are universalistic — they are even the basis of what is sometimes termed the ‘theology’ of human rights. In addition, not only modern values that appear to be less universalistic, such as that of nation, but even more traditional ideas which may seem profoundly anti-modern such as God, community and family, are in fact both fully modern and universalistic as soon as they are injected into the ideological field. And this is so because they are all mobilised as ideas that reflect ‘more desirable’ models of society *as opposed to others* – and this was not the case, as we shall see, in premodern societies in which unquestioned ‘doxic’ principles reigned over the social order.

Despite the efforts of nearly a century and a half of social science research — one of its main goals being, in accordance with a modern rationalist epistemology, to shake the foundations of false beliefs — the principle that even the most universalistic ideas are necessarily the reflection of given

geo-cultural areas, historical conditions, and social positions remains in almost total oblivion among hypermodern citizens, when it is not openly rejected in the name of the belief in individual creative freedom. A more generalised sociological literacy about the social origin of human ideas, preferences and practices would help not just to relativise — no more than ‘ethical relativism’ was the unaware reflection of a short historical-cultural juncture, the one known as postmodernity — but to defuse the totalising, and sometimes totalitarian, potential of any universalistic idea.<sup>4</sup> A certain epistemic awareness of the origin and causes of an idea does not prevent an actor from possibly engaging in a symbolic struggle to affirm the desirability of this political principle being realised; but it gives a necessary sense of the forms, limits, and implications of its realisation.

The lack of this awareness represents precisely the nature of this second problem associated with the contemporary attitude towards modern ideologies: the difficulty of grasping — to reverse the above formula — *the positions behind the ideas*. But if ideological ideas are everywhere, but are neither professed nor recognised as such, responsibility for this also pertains to the excessive burden that the ‘left’ and ‘right’ compass has assumed in the past two centuries. Indeed, while ‘left’ and ‘right’ are very powerful symbols for political mobilisation, they have proved to be of heuristically limited usefulness, with their unidimensional flattening of the world, for making sense of political diversity across modern times and places. Given the inevitable contradictions that ‘left’ and ‘right’ have generated in a much more complex multidimensional space, the belief that this distinction is defunct has gradually gained ground, at the expense of a probably more correct deduction — that they are simply insufficient for heuristic purposes.

In short, the ideas of ideological modernity are widespread, but they are often misrecognised both in their ideological links and in their social genesis. At least, the ideologically polarised actors who are most visible, even if they are not the majority, in the digital public spaces are like soldiers fighting in the name of principles that they cherish and against symbolic armies that they know well, albeit in the name of historical forces that they ignore and, hence, with the illusion and presumption of universal truth. But every

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4 Those who recognise, for instance, a potential for *pensée unique* — or unique thinking — in some historical realisations associated with one, or more, of such diverse expressions as ‘Isis’, ‘cancel culture’, ‘communism’, and ‘liberal capitalism’ will easily see the point.

citizen, association, party, government or institution that takes a position or makes a decision is, in doing so, liable to favour an ideological direction, even if the compass is lost or the destination has been forgotten. And it is above all when the ideological element is denied, typically in the name of a pragmatism which is the watchword of every technocratic power, that an in-depth study of objective ideological directions becomes more necessary.

A deliberate methodological pluralism informs the research methodology on which this book is based. As a contemporary study in political sociology, it combines more qualitative methods of historical sociology with quantitative research techniques from other branches of political and social sciences. Ranging between the logics of historical sociology that Tilly (2001) called “process analysis” and “pattern identification”, this approach on the one hand conducts a qualitative text analysis of selected primary sources (i.e. the original texts of modern political thinkers and activists, constitutional charters, papal encyclicals, and manifestos or declarations of political parties and movements) in relation to the historical, social and political contexts of their production, as reconstructed through secondary sources;<sup>5</sup> in doing so, it proposes a variant of what is sometimes called ‘ideological discourse analysis’. On the other hand, it seeks to detect cyclical patterns of power relations between the ideological matrices, or their contemporary developments, in relation to a selection of events, processes and policies identified as a “historical sequence-of-interest”, as Simmel (1916:

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5 Full justice is not always rendered in the book to secondary sources, neither historical nor related to political thought. In the former case, the great variety of texts that I have consulted over the years has led me to attempt a very selective historical synthesis (along the lines of the ‘Simmel criterion’ indicated below), which relies on one or more specific reference texts only when they are explicitly mentioned. In the case of the literature on political thought, I have deliberately tried to bracket it off so that I can analyse the primary sources (the original texts of the ideologues) by applying the reading grid developed in the theoretical proposal of this book. Moreover, the huge amount of contemporary sociology and political science texts that have not been considered in this work is simply disheartening – incidentally, the ‘axe’ first cut all the author’s self-citations. However, the strategy of working mainly on the original sources for the analysis of the genesis of ideological matrices and on empirical data for their contemporary developments was also dictated by reasons pertaining to feasibility. The undertaking, in fact, simply would not otherwise have been possible, precisely because of the enormous amount of secondary literature.

83) would have called it.<sup>6</sup> This will include qualitative policy analysis of a selection of ideologically revealing government decisions for the historical periods considered.

This qualitative methodology of historical sociology has been combined with quantitative analyses (predominantly longitudinal analysis, but also comparative and cross-sectional analysis, scaling techniques, factor and multiple correspondence analysis) based on a variety of data sources: digital humanities databases for time-series content analysis of non-fiction texts starting from 1800 (Google Book Ngram Viewer), as well as of the political discourse of European political parties and OECD countries in all general elections since 1950 (Manifesto Project database); secondary data from public opinion surveys for the analysis of the ideological orientations of voters in European countries (ESS - European Social Survey, rounds 1-8); and primary survey data collected in 5 European countries by means of a questionnaire explicitly based on the theoretical framework of this book (Unimi/Pomlab survey 2020). Moreover, survey expert data (Chapel Hill Expert Survey – “Trend file”) have been analysed, as well as macro data including economic and social indicators drawn from the World Bank and OECD databases, plus others with indices of civil liberties produced or published by foundations such as the Cato Institute, the Fraser Institute, and the Liberales Institut.

In Chapter 1 the theoretical framework of this book is outlined in its main elements, from the concept of polar stars to that of an ideological matrix, to the distinction between political and metapolitical ideologies. Several arguments are provided that suggest the greater heuristic capacity of a representation of political space that combines original and hybrid ideological matrices compared with the oversimplified left/right scale. Whilst the foundations are only sketched here, it is in each of the following chapters that new elements are added so that the theoretical framework gradually unfolds, including its more dynamic part referring to ‘mechanisms of historicity’ in the ideological field.

It is in chapter 2 that the historical and sociocultural conditions for the constitution of an ideological field are identified: the affirmation of the

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6 This sequence should not fall, for Simmel, below a certain “threshold of analytical segmentation” without running the risk of losing sight of the overall picture.

modern principle of *contingency* and the deployment of the ‘post-doxic’ logic of all ideologies; but also the emergence of a media sphere – first with the sudden explosion of political pamphlets circulating in alehouses across England in the 1640s – around which a notion of public opinion could arise that was neither only ‘bourgeois’ nor coincident with mere common sense; and the slow emancipation of the political field from the confines of parliamentary institutions and with ever stronger roots in society. Furthermore, advanced in this chapter is the idea of political modernity as being characterised by a fundamental tension between ‘centrifugal’ and ‘centripetal’ thrusts, together with the hypothesis of a ‘double movement of modernity’ whereby, among other things, the alleged ‘end of ideology’ was but a provisional point of equilibrium favoured by a specific type of historical context with cyclical tendencies.

Chapters 3, 4 and 5 present a political sociology of ideological thought at the origin of what in this approach are identified as the three fundamental ideological matrices of modernity, namely conservatism, liberalism, and progressivism/socialism, with the respective polar stars or order, freedom, and equality. The analysis of the original texts of the main ‘ideologues’ is conducted in combination with that of their contexts of production, that is, the societal processes and historical events in which the ideological fields were constituted and evolved. While each chapter is devoted to the genesis of a specific matrix, the profoundly relational nature of this process is evident from the continuous relationships of identity and, above all, of opposition between the matrices themselves, as embodied by the respective agents. The analysis of ‘texts in contexts’ starts by searching for the prepolitical foundations of each matrix in a sort of social anthropology expressed by the writings of three symbolic thinkers, namely Hobbes, Locke and Rousseau.

Chapter 3 underlines the decisive role played by ideologues such as Chateaubriand, de Bonald, de Maistre and Donoso Cortés in the constitution of the conservative matrix, while Burke’s contribution is reinterpreted as an early form of British conservative/liberal-constitutional hybridisation. The dual appeal to nationalism of the ruling elites and to mass religiosity, sometimes in conjunction with each other – but also the historical experiences in the French ideological field of the late 19th century such as Boulangism and Maurras’ integral conservatism; and the German

movement of the Conservative revolution after the First World War – complement the conservative matrix with variations that will sow new seeds for future evolutions of a politics that pursues order as its polar star.

Chapter 4 shows that liberalism, the matrix that best reflects the modern rise of individualisation-with-freedom, has distinctive prepolitical, political, metapolitical and economic properties that make it an ideology like any other. However, whilst its politics of individual rights so clearly sanctioned by the Declaration of the Rights of Man and of the Citizen of 1789, but also by Adam Smith's corollary of individual competition and commercial freedom, seems particularly congruent with a centrifugal thrust of modernity, the latter never ceases to trigger a countervailing centripetal pressure. For this reason the liberal matrix, although less often represented by openly 'liberal democratic' parties (whose electoral payoffs have historically been limited in the era of mass democracy), is the pivot around which the forces from the other matrices tend to position and reposition themselves, either by 'contamination' or by antithesis, in contemporary ideological fields. Hence, the liberal matrix was the most powerful engine of ideological 'historicity' throughout all modernity, and arguably still is today.

Chapter 5, which begins with an excursus on the usefulness of a socio-historical approach that could be termed 'symbolic of the structural', recalls that, while modern proto-socialist grievances were present among the English Diggers around 1650 and in French revolutionaries like Babeuf in the 1790s, it was not before the 1830s, namely in France, that the idea of 'progress' merged with socially egalitarian tendencies and gave rise to the progressive/socialist matrix. It is not only in Karl Marx's thought, but also in the previous positions of early socialist thinkers such as Blanc and Proudhon, and in the later evolutions of the German Social Democrats, the British Fabians and even the Russian *Narodniks*, that a wide range of proposals on the issues raised by private property, the state, and socioeconomic inequalities were devised, both within and beyond the framework of industrial modernity.

In each of these three chapters the manifestations of the matrices in the form of political parties are monitored, especially in the critical transition to mass politics in the last decades of the 19th century. Examples are also suggested of how the principles generated by the original matrices can apply to contemporary political issues. One thesis of this book is, in fact, that

virtually all subsequent ideological expressions of political modernity, including hypermodernity, derive from one or more of the original matrices, whether through adaptations, radicalisations, ‘interstellar’ hybridisations, or combinations with specifically metapolitical goals. Along these lines, chapter 6 analyses Christian social doctrine, fascism and National Socialism not so much as original ideologies as ideological constructs which, if not devoid of characteristic elements, can be largely apprehended through the conceptual tools that were already available in the ideological fields in which they originated. In addition, some possible macro-level indicators are suggested to assess if and to what extent a certain regime, such as Francoism in Spain, Socialist Cuba or contemporary New Zealand’s democracy, can approach more or less ‘pure’ or hybridised conservative, progressive/socialist and liberal types.

Chapter 7 provides a historical political sociology of the development of ideological fields in European and Western politics over the past hundred years, with a particular focus on the decades between the Second World War and present times. Although it cannot be summarised in a few lines, the analysis of this chapter applies the main theoretical tools of the book by reading contemporary political history through the lens of the double movement of modernity consisting of a continuous tension and slow alternation of centrifugal (i.e. individualising) and centripetal (socially protective) waves. As a result, the polar star of individual freedom in some phases tends to colonise, while in others it is rejected by ideological agents of the matrices of order and equality. The latter in the 1980s and 1990s deviated from their respective polar stars to adapt to changing contextual factors in society, economy and international politics, but gradually restored them as guiding principles of their political discourses and their policy positions over the two following decades. A temporary peak seems to have been reached with the ‘ideological revival’ of the 2010s.

Chapter 8 shifts the focus away from a macro perspective and addresses the question of how to study public opinion and voters at an individual level using a polar-star approach. By presenting two exploratory studies based on opinion survey data, one using the first eight waves of the European Social Survey (starting in 2002), the other an original survey conducted in 2020, this chapter seems to corroborate the appropriateness of a multi-dimensional and relational approach linking party voters with ideological

classes derived from the main six original and hybrid types. Voters who are closest to the three original matrices also tend to differ in their metapolitical attitudes towards liberal-democratic, populist and authoritarian political systems. Finally, other possible applications of the model (as illustrated in figure 8.4) are suggested that transcend the research fields on voting and public opinion and may interest scholars of social movements, public policies, and political communication, among others.

# Chapter 1

## Pursuing a polar star: political ideologies and metapolitical goals

### 1.1. Beyond a unidimensional (left and right) representation of the ideological field

The metaphor of a ‘polar star’ for the ultimate and fundamental aim of a political ideology may seem to reflect a purely philosophical and abstract mode of thought which overlooks the changing societal conditions and historical contexts in which ideologies can arise, develop, and eventually disappear. An ever-fixed political goal is allegedly ahistorical – it remains blind to the historical configurations and sociological formations whereby ideologies are differently constituted into actual political movements and institutions. Alternatively, it should imply a historical teleology that regards a given societal project as necessary and, possibly, forthcoming. These are two well-grounded objections to a sociologically naïve use of these ‘astral’ metaphors in the study of ideologies. This is also the reason why the concept of ideological ‘polar stars’ must be carefully specified.

In his famous essay *Left and Right: The significance of a political distinction* (1996), the political philosopher Norberto Bobbio referred to the principle of equality as the ‘polar star’,<sup>1</sup> and thus the ideological essence, of the political left, at least from the French revolution onwards. Its polar opposite – the defence of inequalities – has represented in turn the ideological essence of the political right. Among the possible problems arising from

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1 In political philosophy, the first use of the metaphor of a ‘polar star’ as the ultimate, fundamental aim of a social group can be found in J.S. Mill’s writing on the subjection of women: “When we put together three things—first, the natural attraction between opposite sexes; secondly, the wife’s entire dependence on the husband [...] ; and lastly, that [...] all objects of social ambition, can in general be sought or obtained by her only through him, it would be a miracle if the object of being attractive to men had not become the *polar star* of feminine education and formation of character” (1869, 19).

this conceptual scheme, a particularly noteworthy one is that, while the left is depicted as pursuing its own polar star, the rationale of the political right seems to be rejection of the polar star of the left or, at best, a negative notion – inequality with its privative prefix (*in-*). While philosophically plausible, this solution seems less viable in terms of real political processes, for several reasons.

First, it implies that the political space can be reduced to a single dimension of conflict based on a dyad of opposing positions – a premise that will be clearly discarded in this book. Secondly, it rests on the assumption that these positions are always mutually exclusive and overlooks the possibility that each political side and actor pursues a different main objective (e.g. equality, order, or individual liberty) without necessarily and totally opposing the objectives of the other parties; depending on the issue at stake, in fact, it may give the latter only secondary importance in its order of preferences. Third, it is assumed that a negative or privative ideological aim (inequality) has shown the same capacity for mass mobilization and political action throughout modern history as a ‘positive’ polar star (equality) — an assumption which is not only empirically very doubtful, but which also sounds normatively easier to accept on the left (with which Bobbio identified himself) than on the right of the political spectrum.

Although Bobbio’s analysis has several shortcomings, I will argue that the idea of ‘polar star’, when converted into the plural form, provides an illuminating entry point and a powerful operational tool for a sociological study of political ideologies. Despite a certain degree of ‘essentialism’, which seems to violate the sociological principle that social reality is fundamentally *relational* and subject to transformation across different historical and societal contexts, the polar star metaphor is far from addressing an implausibly ‘universal’ set of political goals. These goals have, in fact, been historically constituted – they correspond to the fundamental goals of political *modernity*. The polar stars that we identify as the fundamental drivers of the main modern political ideologies are, therefore, long-lasting, yet historically and geo-culturally situated in the specific context of Western modernity. Indeed, it is only in the past few centuries of European (and, in part, American) history that human values such as freedom, order, and equality have been established as explicit and consistent political goals – as

ideological polar stars – in order to justify a normative view of how society should be collectively organised.

Besides the argument asserting the modern genesis of the ideological polar stars, a second important argument provides a strong sociological foundation for this metaphor. If we conceive not one, but several polar stars guiding the path of humans, there is no possible universalist anthropological claim that the same goal is equally manifest to and shared by all of humanity. Conversely, we can extend the metaphor to cover the idea that the specific polar star – or the kind of political goal – that becomes apparent and guides human action depends on the position of the observers on the planet, i.e., metaphor aside, on the subjects' position in the social space. This approach is fully consistent with a sociological truism – one, however, that is too often forgotten: that political beliefs, preferences and identities are not randomly distributed across social groups and environments – quite the contrary: their very origin and flourishing is associated with specific geo-cultural contexts, historical moments and class or status positions.

It should be conventional wisdom in historical sociology that *freedom* – as a political value, a commercial interest, and a constitutional goal – was pursued from the 17th century onwards by the emerging bourgeoisie in the Dutch provinces, in Britain, and, later, in France and elsewhere in Europe and North America; that the principle of *order* – the fundamental goal of maintaining or restoring a certain configuration of political, social, and moral order – served as a unifying historical force for the crown, the aristocracy and the church on the eve of the British Civil War, but also before and after the Glorious Revolution, the French Revolution, and the 19th century's Prussian, Habsburg and Tsarist empires; and that the idea of *equality* – not only formal equality before the law, which is subsumed in the liberal enterprise of granting individual *freedom* and civil rights – but socio-economic equality (or the reduction of such inequalities) is associated with the rise of the working class and labour movements in industrial modernity, around the middle of the 19th century.<sup>2</sup> However, even this fundamental tripartition of the political space throughout political modernity

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2 Rawls (1971:13) distinguishes between these two “rather different principles” of justice: on the one hand, “equality in the assignment of basic rights and duties”; on the other, “social and economic inequalities” which are “just only if they result in compensating benefits for everyone, and in particular for the least advantaged members of society”. It is to this second principle that we refer in relation to ‘equality’ as a polar star.

and its implications for contemporary politics are far from being not only applied, but also accepted as such today. Three chapters of this book will be devoted to the theoretical construction (and not to the mere de scription of a reality that has supposedly been ‘out there’ in history, books, and human brains) of the three ideological matrices which correspond, as abstract ideal-types, to the three ‘polar stars’ of freedom, order, and equality, with the particular meanings that will also be defined and specified (a very brief summary is anticipated in figure 1.1).

To be sure, the successive advent of liberal constitutionalism, mass democracy, totalitarian regimes, the welfare state and post-industrial societies over the next century has profoundly transformed the contexts in which political ideologies operate and connect with social groupings. Ideologies such as liberalism, conservatism, and socialism/progressivism have

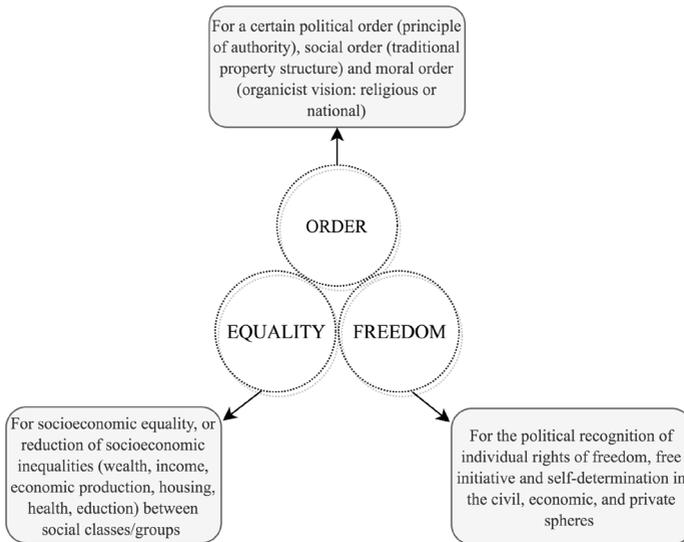


Figure 1.1. Ideological ‘polar stars’

The ultimate goals of order, freedom and equality – after their conceptual ambiguities have been drastically reduced – respectively define the conservative, liberal and progressive/ socialist ideological matrices of political modernity

acquired new and different meanings across time and space, and the nature and functions of the ideologies themselves have changed; several observers have proclaimed the end of ideological politics since the rise of a relatively consensual American society in the 1950s (Bell 1960; Lipset 1960). The erosion of class-based politics, due to the erosion of the class structure of modern industrial societies, is another mantra in contemporary political sociology. The social bases of party support have not only weakened – manual workers, for instance, have withdrawn electoral support for left-wing parties in West European countries since the 1980s (Kitschelt 1994) – they have also changed: new social coalitions (such as that between ‘the lords’ and ‘the grocers’, symbolising respectively the proprietary class and the petite bourgeoisie that became the ideal-typical Tory stakeholders in British mass politics) have replaced the previous electoral blocs.

Furthermore, the almost simultaneous discourses, all of which became prominent in the last couple of decades of the 20th century, about the rise of ‘postmodernity’ in culture and society (Harvey 1989), the consequences of globalised modernity on the erosion of institutional politics (Beck 1997), and the liberal-democratic/pro-capitalism consensus in Western politics after 1989 (Fukuyama 1992), have raised serious challenges to the survival of political ideologies both as markers for political positioning and as drivers of political action. Finally, the further acceleration of technological change, communication flows and patterns of political consumption that is unfolding in the digital societies of the new millennium may raise doubts about the usefulness of a sociological study of modern ideologies in contemporary politics.

Upon closer inspection, however, there are several reasons that suggest the opposite, namely, that an empirically grounded reconceptualization of modern ideologies and their study in connection with history and societies have become even more appropriate in recent years. A distinctive thesis of this book is that a model based on the three fundamental ideological matrices of political modernity, as captured by the respective polar stars of freedom, order and equality, not only provides a more accurate and meaningful account of political space, especially when compared to the left/right dichotomy in the recent centuries of European politics, but also applies effectively to the positioning of political actors in relation to contemporary issues and policies. The idea that the political space, as historically

constituted in modern Western politics, can be explained – and not just described, as with the Cartesian planes resulting from two orthogonal axes – by three ideological tendencies rather than only two (left and right, or progressives and conservatives) is anything but eccentric. But although this idea does not require a scientific revolution, the way in which it is developed in this book is an invitation to wear those “inverting lenses” which Thomas Kuhn attributed to scientists when they embrace a different paradigm and, hence, come to see the usual constellation of objects radically transformed (Kuhn 1962: 122). These threefold lenses in the study of the ideological field were already existent and available, but perhaps not adequately employed. However, this idea also needs to be specified thoroughly, as well as developed in a more complex theoretical model, in order to avoid the infinite misunderstandings that promptly arise when dealing with a delicate issue such as that of political ideologies.

The first point – that an ideological matrix-approach to the political space is not eccentric – can be supported with some notable examples. In these cases, the authors cited make use (but without further developing them) of conceptual lenses not too dissimilar to those used in this book. In his important study *Ideology and Utopia* (1929), Mannheim identified the following ideal-types as the main ideological currents of the nineteenth and twentieth centuries: conservatism (divided into a bureaucratic-authoritarian and a historical-irrationalist type); liberalism (or ‘liberal-democratic bourgeois thought’), and socialism/communism, while fascism was seen as a peculiar *Weltanschauung* that praised the primacy of direct action, the urgency of a rupture with history and unconditional subordination to a leader. But in this sense, and if one agrees that its political programme was mostly indeterminate, fascism consisted more of a ‘metapolitical’ than a political ideology.<sup>3</sup> The same observation applies to bureaucratic conservatism, which Mannheim viewed as the expression of a modern bureaucratic rationality whereby politics is reduced to a problem of administration, as was, in part, the case in the Prussian State. But lacking a specific political principle of vision – or a vision of how society should be politically organised – bureaucratic conservatism would be considered, according to the conceptual tools

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3 Mannheim reports a speech in which Mussolini explicitly claimed that he had no other programme than “to rule over Italy”, because “Italy’s salvation does not depend on programs but on men and strong wills” (1929, 119).

of an ideological-matrix approach, essentially as a metapolitical ideology. In fact, it prescribes *how* the relationships between the state and society must function – it regards the *quomodo* of politics – rather than a political ideology, since it does not specify *what* should be done, that is, the desired political recipes and contents – the *quid faciam* of politics.

Mannheim took his sociology of ideologies – the idea that “behind every theory there are collective forces expressive of group-purposes, -power, and -interests” (1929: 110) – so literally that he posited social groups as the main standards for the categorization of ideologies, regardless of the contents of the ideas put forward. In doing so, he came to a conclusion so paradoxical that it included not only Sorelian syndicalism, which was one of Mussolini’s explicit political models, but Bakunin and Proudhon’s anarchism in the same ideological category – from a sociological point of view – as fascism. The reason is that all these ideological currents shared a primacy of activism and intuitionism typical of non-bourgeois social groups seeking “a direct collision with history”. These ‘putschist’ groups, whatever their specific political ideology, were typically led by pseudo-intellectuals who were outsiders with respect to the different – but all recognized as culturally legitimate – liberal, conservative, and socialist strata of intellectuals. In the absence of an adequate social status and cultural recognition, these “proletaroid intellectuals”, as Pierre Bourdieu termed them after Max Weber,<sup>4</sup> had an interest in stirring up the deprived or displaced social strata that distrusted parliamentary institutions and rejected the rational approach of gradual social change. It is, therefore, only as ‘metapolitical’ ideologies that anarchism and fascism can be located at the same pole of a continuum that would see bureaucratic conservatism, with its primacy of formal rules and the science of administration, as its polar opposite. Thus, only three ideologies that I would define as ‘political’ remain in Mannheim’s typology: (“historical”) conservatism, liberalism, and socialism.

A similar idea – that reasoning in terms of ideological matrices is heuristically more advantageous than using symbolic points of reference such as left and right, or theoretical constructs such as “demarcation” vs. “integration” (Kriesi et al. 2008) – was also implicit in Giovanni Sartori’s *Parties*

4 Weber devoted a short section of his *Sociology of Religion* to “non-privileged” quasi-religious intellectualism, which included “plebeian” or “Pariah” intellectualism (1978: 508-14). Bourdieu referred to “proletaroid intellectuals” in several works, but with particular insistence in *The Rules of Art* (1996) in relation to the field of artistic production.

*and Party Systems* (1976), where he states that “the labour-liberal-conservative distinctions are anchored, semantically, to a cognitive substratum [...] while the left-right distinction can stand and float as a purely emotional symbolism” (304). Although the qualification of “purely emotional” is inadequate, it is clear that ‘left’ and ‘right’ are spatial terms which need to be filled with political meanings, and which, given the semantic indeterminacy of the terms, can potentially be filled or refilled with any political meaning throughout history and geography. Although the “cognitive substratum” of conservatism, liberalism, and socialism (but also progressivism) is far from being universally shared and established forever, it nonetheless refers to ‘the elementary forms’ of an ideological matrix whose meanings extend across political modernity. The matrix therefore contains the ideological *fil rouge* resulting from the historically constituted social roots of modern political groupings; as such, it broadly corresponds to the polar star of each of the main modern ideologies and its main derivative elements.

It is also noteworthy that a similar tripartite model is at the basis of Esping-Andersen’s (1990) typology of welfare regimes, that is, of the varying combinations of capitalism and welfare states of the twentieth century. In this highly influential work, the three categories consisted of 1) market-oriented “liberal” regimes; 2) family-centred “conservative” regimes, and 3) universalistic pro-equality “social-democratic” regimes. If the labels are quite similar to those employed here, what Esping-Andersen provided was precisely a typology: that is, a static and descriptive categorization of the main welfare systems, or “worlds of welfare capitalism”. This also implied a much more limited range of possible variations, given the strong structural commonalities – they were all welfare states within the framework of a market economy – between the three types. For our purposes, however, Esping-Andersen offers an important reminder by defining the welfare state as a “system of stratification” which, through the ‘poor-relief tradition’ of Bismarck’s social-insurance model and corporative state conservatism, holds recipients back in the class structure and ties their loyalties to the central state authority. While this would fit rather badly with a typical right-wing or US conservative policy of the twentieth century, which is often associated with small-government and anti-welfare approaches, it is, on the contrary, fully congruent with a European conservative ideological matrix, that is, with the ideological core of historical conservatism, which

pursues the polar star of the preservation of a ‘certain’ – not ‘any’ – social order.

## 1.2. The rationales of an ideological matrix-approach to the study of politics

Having established the scientific legitimacy of a three-way solution that acknowledges the shortcomings of a dyadic model (because liberals and conservatives, in their ‘pure’ – but historically very vivid and concrete – ideal-types are completely different ‘political animals’, just like liberals and socialists/progressives), the theoretical appropriateness of this model should be further discussed.

First, a spatial representation of politics based on the historically-rooted meaning of a limited set of ideologies as captured in their philosophical, political, and social core – their *matrix* – has the advantage of being more than merely descriptive. Indeed, such a model is also explanatory insofar as it is ‘self-explanatory’: (classical) liberals, for instance, take certain positions because of their ideological dispositions, which are consistent with the fact that they occupy a position in the social planet where the polar star of (negative and positive) liberty shines particularly bright. The probability of being ideologically liberal, in fact, is associated with the probability of holding a certain position in the social space: in addition to the macro geo-cultural location, it also regards the configurations of the economic and cultural capital of individuals, their social trajectories, their employment status, their personal networks, etcetera. Of course, the same applies to being a conservative, or a socialist/progressive, and to the different combinations that a dynamic model encompasses.

Secondly, the ideological matrix-approach is ‘parsimonious’, but without flattening the political space into one dimension – as in the too parsimonious left/right dyad. A typically non-parsimonious logic would be that of a ‘complete’ repertoire of the modern political ideologies. However, not only would it be very broad, since it should include – as in classic taxonomies like that of Von Beyme (1985) – radicals, Christian democrats, communists, right-wing extremists, ecologists, as well as regional, ethnic, agrarian, and other ideological tendencies; it would also be exposed to an unsolvable double bind. Indeed, either the repertoire is destined to remain incomplete,

because contemporary ideological currents, if they can be inferred using the logic of ideological matrices and their ‘polar stars’, cannot be subsumed into strict definitions relating to classical ideologies (noting that a contemporary movement draws mainly on the progressive/socialist matrix, for example, is not the same as defining it as a ‘socialist movement’); or they must be continuously updated to include all the latest ideological variants, including the Alt-Right and the Yellow Vests movement. This claim to exhaustiveness is inherent in the hyper-descriptive mode of thought of the ‘repertoire’, which will be longer the more it aims to be precise, capturing all the different nuances of existing ideological tendencies, but which thus provides a static inventory unable to comprise anything that deviates or falls off the list. In contrast, a parsimonious theoretical model aims to use only what is strictly necessary to infer and apprehend the diversity of contemporary variations as different developments and combinations of the matrices of the fundamental political and metapolitical ideologies of modernity.

This leads us to consider a third advantage of a model that highlights the continuing relevance of the ideological matrices of political modernity, that is, its combinatorial nature. Against the abstract philosophical principles which state that not only is political space best represented by a dyad (left and right), but also that it is composed of mutually exclusive positions, a realist sociology of political ideologies must be attentive to continuous historical configurations of political tendencies combining different but not necessarily exclusive polar stars.<sup>5</sup> Therefore, alongside the ‘pure’ ideal-types of the main ideological matrices, one can find *hybrid* types resulting from various combinations of the pure types, but which become ideal-types themselves. Hybrid types like those combining the liberal and socialist/progressive matrix – the liberal and the conservative, or the conservative and the socialist – have the potential to effectively capture concrete elements of many historical cases that present recurring ideal-typical features.

In a famous book, Latour (1993) lamented modernity’s obsession with ‘partition’ (or conceptual separation and categorisation) and its consequent inability to grasp the “real ontology of the world”, which is made up – in Latour’s view – of social and natural hybrids/networks of ‘humans’ and ‘nonhumans’. This book considers *hybrids/networks*, as one might call them, even of apparently opposing ideologies, but for the purpose – profoundly

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5 This abstract principle is also explicitly present in Bobbio (1995).

### Ideological types

The political-ideological matrices of modernity correspond to three main original types (C=Conservative; P=Progressive or socialist; L=Liberal) which give rise to three main hybrid types (CL=Conservative/Liberal; PC=Progressive-socialist/Conservative; LP=Liberal/Progressive-socialist). The dotted central circle identifies a position of full hybridisation of the three main matrices.

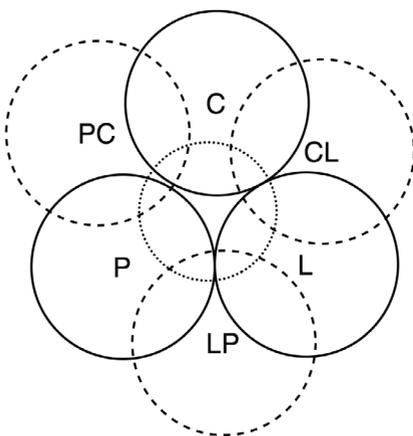


Figure 1.2. Original and hybrid ideological types

‘modern’ – of understanding and explaining political reality. It will then perhaps be realised that the political space, as defined by real institutional and party actors on the one hand, by civil society, citizens and public opinion on the other, cannot be fully understood without recognising the existence and spread throughout modernity of processes of ‘interstellar’ fusion, that is, of hybridisation between alternative ideological polar stars. And if this violates the Aristotelian principle of non-contradiction, the abstract linearity of this classic logic has been challenged several times by modern philosophy, from Hegel’s “rational” acknowledgement of real-world syntheses to the principle of quantum *superposition* in the quantum mechanics of the 20<sup>th</sup> century.

Fourth, the model proposed is not a static taxonomy, as already noted, but a dynamic configuration of alternative, yet not totally incompatible, polar stars variously combining not only with each other – see the idea of ‘interstellar hybridization’ above – but also with other *metapolitical* ideological tendencies, which reflect different ideas about how political power should be exercised, by whom, and with what degree of popular influence. All these aspects regard the fundamental formal rules of the political game,

that is, the jurisdictional-institutional prerequisites of politics. Monarchism and republicanism, centralism and federalism, but also liberal parliamentarism and populism are just some typical instances of different normative views on the desirable relationships between various state institutions and society within a given territory. As such, they concern the mode of government of a country, its regime, the forms and limits of political sovereignty. Metapolitical ideologies, in other words, belong to a level ‘beyond’, but also ‘around’ (two meanings of the Greek prefix *μετα-*) politics: that is, they transcend the realm of divisions that lead to collectively binding decisions concerning the organisation of society. Instead, they are about the organisation of politics itself.

Of course, the conceptual boundaries between the political and the metapolitical can become porous in their empirical translations. It is clear that each historical manifestation of any of these metapolitical ideologies is intertwined with the political issues at stake in that particular national context. European nationalists who fought for the independence of their country in the middle of the 19<sup>th</sup> century, for instance, tended to espouse not only liberal-parliamentary metapolitical orientations regarding the preferred mode of government, but also liberal-democratic political orientations in relation to the field of party politics and the political organization of social life. By contrast, French nationalists still resentful of defeat in the Franco-German war tended during the last decades of the nineteenth century to combine with ultra-conservative positions in national politics.

Therefore, if metapolitical ideologies are far from being, in their historical manifestations, isolated from political ideologies, their fundamental ideological matrix still regards the *quis* (who exercises power), the *quomodo* (how, in what forms), and the *quantum* (with what limitations and what degree of popular influence) of politics, rather than its *quid faciam* (what to do, what political decisions should be made to regulate the collective life of a country). This will also enable us to apprehend contemporary populism, which is often referred to as a “thin ideology” (Mudde 2002), and is thus conceptually decontextualized from other metapolitical ideologies, as a specifically metapolitical ideology that places particular emphasis on the question of the *quantum* of direct popular control over the institutional procedures of political decision-making. This obviously has direct implications for the conception of the legitimate *quis* and *quomodo* of a democratic regime.

Much of the confusion that can frequently be found when applying an ideological label to a given political force or actor stems from neglecting this conceptual distinction between political and metapolitical ideologies. The conventional wisdom that traditional ideologies do not serve to understand today's politics fails to realise that, while it is true that legitimacy crises of representative democracy cause political parties to invest more and more in metapolitical messages (e.g. to 'restore' popular sovereignty; to rely on a strong leader; to develop new forms of citizen participation), the political agenda is constantly made up of issues that gravitate around the fundamental goals of (a certain) order, freedom, and equality, with their relative hierarchies of priority and balances. And if actual governmental decisions often transcend ideology and reflect other logics specific to the realm of policy-making (including the exercise of political power relations, interest-based bargaining, institutional appropriateness, coalition building, and the like), politics always implies – as a process of politicisation of an issue – discourses and justifications that are 'ideological' because they appeal to one of the fundamental goals of political modernity.

As we shall see, the same stance on a political issue – for instance, a pro-environment stance, or one favourable to gender equality – can also be framed through very different symbolic appeals to orders of justification that correspond to more typically conservative, liberal or progressive positions. A conservative environmentalist frame, for instance, may assert the intrinsic value of unspoiled nature and advocate the defence of 'our' land; a liberal frame may appeal to the universal right of global citizens to live on a healthy planet and not be killed or made sick by pollution; and a progressive/socialist one may invoke stricter state regulations on the polluting business activities of private companies, or denounce a capitalist model of development based on the exploitation of natural resources and driven by the market.

On other issues, the positioning itself will suffice to echo only some specific ideological matrices and to exclude others. Thus, a strong pro-gender equality stance does not reflect a 'pure' conservative type, but may result – under the seemingly progressive polar star of 'equality' – from both a liberal and progressive frame. Indeed, a dual framing of gender equality also reflects two different historical strands of the feminist movement, one more oriented towards guaranteeing equal rights/liberty to women in both family

and public life, the other focused on removing socioeconomic inequalities that weigh disproportionately on the condition of women inside and outside the labour market. Overall, therefore, an ideological-matrix approach is not a simple, static tripartite schema for political analysis; on the contrary, it is a dynamic model aimed at grasping the modern ideological roots of politics in its multiple dimensions and its changing historical manifestations.

Finally, the idea of an ideological matrix which refers mainly to the original and essential mould or template that constitutes the nucleus of a political ideology is also well suited to research, in the study of contemporary public opinion, on the ideological ‘footprints’ of party vote. Is the presence of the ideological matrices of modernity still visible in the empirical relationships between contemporary parties and voters? And, if so, among which types of voters? Given that the ideological matrix approach applies primarily to the supply side of politics – it aims to explain the logic of conduct of collective and individual political actors by relating it to their position in the ideological field – this book will investigate whether it can also structure individual positioning at the level of mass opinion.

At the psychosocial level of individual citizens, I propose that being ‘ideological’ implies: (1) a tendency to transform ontological beliefs into certainties concerning the state of the social world and its causes; (2) having strong convictions and (orders of) preferences on the desirable model for the social world, and (3) adhering, even if only at the affective level, to an existing group among those available or in formation in the current political-ideological field. The third element, which corresponds to the notion of a ‘collective identity’ where individual identities can coagulate on the basis of a relationship of solidarity and with the mediation of networks of belonging,<sup>6</sup> also implies the identification of political enemies, or targets of negative affective identification, in the ideological field (including parties, leaders, ideologies, social groups, etc.); and a certain proneness to take political action, or at least a minimum degree of active political participation (such as voting for a party and being ready to disclose it publicly). Three

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6 In this sense, the notion of collective identity must combine elements of more structuralist derivation which see the expressive dimension of collective action as still linked to some objective position, with its specific interests, in the social space (Pizzorno 1978) with more micro-constructivist contributions that emphasise the importance of emotional investment in cultural symbols in the individual process of identity formation (Melucci 1989).

dimensions – one perceptual, one normative, and one expressive – are, therefore, involved in this process.

However, as public opinion research extensively demonstrated over the course of the twentieth century, not only are there relatively few ‘ideologies’ in the general public, but the individual levels of consistency of political attitudes among them are generally quite weak.<sup>7</sup> This low degree of ideological structuring of public opinion is associated with an important sociological assumption regarding the lack of a full and explicit awareness on the part of persons of their social practices and dispositions. Max Weber, for instance, claimed that “in the great majority of cases actual action goes on in a state of inarticulate half-consciousness or actual unconsciousness of its subjective meaning”, and that, therefore, “the actor is more likely to ‘be aware’ of it in a vague sense than he is to ‘know’ what he is doing or he explicitly self-conscious about it. In most cases his action is governed by impulse or habit” (1922, 21). Beyond and above a post-Marxian definition of ideology as false consciousness, which may possibly apply to an individual’s beliefs about the state of the world (element 1 of the definition above), it can be argued that ‘being ideological’ in politics necessarily requires a certain degree of awareness both of one’s own orders of preferences (element 2), and affective adhesion to a political group (and opposition to another) (element 3). In the absence of these two requirements, what remains is a set of beliefs about some aspects of social reality that are usually taken for granted. Rather than identifying a political ideology, this notion would float in the same semantic field as sociological/anthropological concepts of common sense or cultural disposition.<sup>8</sup>

From a sociological perspective on public opinion, it would be naïve to attribute to citizens and voters the ability to order preferences for sets of alternative ideological options on the basis of the agents’ relative utility, as in rational choice models derived from economics.<sup>9</sup> As noted above, not only is

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7 From Converse 1964 to Zaller 1992.

8 The fact remains that each individual’s positioning on a theme can objectively go in the direction of one ideological matrix or another. This work of clarifying positions in the political space, which is inherent in the ideological matrix approach, can be applied to both policy decisions and to individual responses, regardless of whether they come from a consistently ‘ideological’ actor.

9 It is on the basis of this sociologically realistic assumption – which draws on the work of Max Weber as well as Bourdieu’s critique of instrumental rationality – about the

the lack of a homogeneous degree of political competence within the general public a well-established fact in the discipline, but, even more generally, social actors tend to pursue ‘interests’ that transcend the mere utilitarian dimension of instrumental self-interest. However, this does not mean that individual citizens, even those with lower levels of political information, are devoid of any meaningful ideological referent that allows them to position themselves, if necessary, on matters of everyday politics. These references, often referred to as ‘heuristics’,<sup>10</sup> typically consist of group identifications such as those that citizens develop, in addition to those that connect them to social groups and civil society organisations, with political objects such as parties, leaders, and ideological blocs. To a lesser degree of potential affective attachment, the very act of voting is also a clear manifestation of a citizen’s conscious relationship established with a political party. Furthermore, citizens can have conscious general preferences, if not coherent sets of ordered preferences, at least about the fundamental objectives of politics. In other words, they can identify one or more ideological polar stars as more or less congruent with their own political dispositions. In the empirical detection of the footprints of modern ideologies in contemporary societies, it will therefore be important to ‘relax’ the assumptions about what must be defined as ‘ideological’ and to investigate the survey responses provided by large numbers of party voters. In doing so, this study will empirically test the usefulness of the ideological-matrix approach to reconstructing and understanding the political space in contemporary European societies.

In an era in which the social sciences see the undisputed growth of the idea of ‘decolonisation’ – that is, the need to think about the political and social world outside a Western historical and epistemic paradigm – it may seem anachronistic to propose an analysis of political ideologies centred on the concept of Western modernity. This approach, however, can be justified on two grounds. First, even though “multiple modernities” (Eisenstadt, 2002) have unfolded across different geocultural areas of the world, and each of these modernities has partly translated the particular configuration of

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meta-rational nature of individual preferences that the literature derived from Anthony Downs’s seminal work (1957) will not be considered within the theoretical framework of this book.

10 See, for example, Kuklinski and Quirk (2000) for a discussion of the notion of heuristics applied to public opinion. The more general notion of heuristic dates back to Tversky and Kahneman (1974).

historically established social structures and norms, all countries that have been affected, sooner or later, by a certain process of modernisation have had to face similar challenges. Capitalism, democracy, science, technology are some of the pillars of modernisation as a geographically relatively transversal process, although the historical origin of most of these processes is to be found mainly in Europe. Of course, not all countries have integrated all these elements into their national system of functioning, but all countries have had to address them in one way or another. Therefore, a tension between the principles of order and freedom, but also between freedom and equality, and between equality and order, has affected, at a certain moment in their historical development, all the societies involved in a process of modernisation, even in the absence of an explicit politicisation of these themes. Second, many non-Western countries have absorbed more or less large doses of Western politics, whether it was through colonisation, as in India with British Crown rule after 1848, through cultural influence, as in China (nationalism after 1928, then communism after 1949), or both, as in Japan (fascism in the 1920s, liberal conservatism after World War II and the US occupation). Ideologies developed in Europe and, since the declaration of Independence in 1776, in the United States have expanded throughout the world over the centuries and made the main ideological categories understandable to all national elites, if not always experienced directly by the local populations.

In summary, it is sociologically wise to avoid the universalisation of scientific discourses built on European societal configurations and cultural meanings, such as those relating to 'social class'. At the same time, however, some essential categories of analysis, such as the fundamental guiding principles of politics and the corresponding ideological matrices, can be applied to different geocultural contexts not so much as anthropological invariants, but as culturally recognisable objects, at least to a certain extent. In other words, it is necessary to focus on the social history and political philosophy of Modern Europe in order to identify the core meanings of the fundamental ideologies which tend to structure the space of politics. The resulting framework will enable us to interpret the connection between social space and ideological field in Europe in recent centuries, but it will also provide a further key to understanding, without any pretence of completeness or 'colonial' ambitions of any kind, the positioning of political actors in the ideological field of non-European countries.



## Chapter 2

# The ideological matrices of modernity

### 2.1. The ideological logic of social modernity

In order to understand the origin and meaning of political ideologies, they must be seen as closely related to *modernity*, an idea that has been widely conceptualised and debated in sociology, and social sciences more generally, since the 1990s. But it has long been clear what *modern* implies: novelty, of course, but a specific type of novelty that results from movement, transformation, science, reason, individuality, liberty, market, progress, technology. Furthermore, modernity has embraced more directly political processes and ideas such as state, centralisation, sovereignty, legitimacy, politics itself and, together with all these, ideologies. What is the logical connection among these bundles of historical and social processes? What explains the emergence of an ideological field in Europe between the 17th and the 19th centuries? And even more importantly, why is all of this still crucial to the analysis of 21st century political space?

From an epistemological point of view, the modern age has seen the rise of an important, albeit very abstract, concept — contingency. Contingent is the opposite of eternal, transcendent, absolute, certain. It therefore extends beyond the realm of what is socially decidable. Neither Nature nor God are ‘contingent’; in fact, they are the exact opposite. On the contrary, each of the elements listed above as ‘modern’ introduces elements of contingency into human life. Any instance of social change, whether favoured by the accelerated transformations of agriculture, manufacturing, trade, industry, transport, cities, units of measure, money, medicine, the arts, clothing and the like, incessantly demonstrates, both to individuals and collectives, the ‘possibility-of-being-otherwise’, which is but another expression for contingency.

In the realm of ideas and beliefs, modernity has been accompanied by ‘enlightened reason’, that is, by a rational critique of religious truths and

dogmas, as well as any conviction founded on traditional authorities and the authority of tradition. The absolute monarchies, which had gradually imposed, at least from the 16th century onwards, the principle of a unified and uncontested state sovereignty, were challenged in their traditional legitimacy which rested on divine right, firstly in England with the Commonwealth of 1649 and the Glorious Revolution resulting in the Bill of Rights of 1689, then in France with the Revolution of 1789. These political challenges were not, understandably enough, raised by the landed nobility or the clergy,<sup>1</sup> but by a nascent bourgeoisie of which merchants and lawyers were among the most typical representatives. The identity of these two social groups is important, also from a symbolic point of view, because each of them tends to embody one of the two main dimensions – respectively commercial (i.e., economic) interests and civil liberties/political rights – constitutive of a first modern ideological matrix, that of liberalism.

In all likelihood, the first time that an ideological field emerged in its modern sense was in Britain in the early 1640s, on the eve of the so-called English Civil War, that extraordinarily important process which first led to the removal of the monarchy, then to the constitution of a parliamentary republic (the ‘Commonwealth of England’) and, from 1653, to the dictatorship of Oliver Cromwell (the ‘Protectorate’) until the restoration of the monarchy in 1660. Amid the changing power relations between parliament and royalty, 1641 saw the dissolution of the royal Star Chamber, the repressive court that enacted censorship and licensing laws on the press.<sup>2</sup>

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- 1 It was in an earlier historical phase that the feudal nobility defended its political prerogatives from the centralising efforts of a nascent modern state; it was in a later historical phase, mainly with the spread of liberal constitutions and the rise of nation-states in Europe in the second half of the 19th century, that the clergy defended its social prerogatives (from education to marriages) from the growing intrusiveness of the state into society.
  - 2 It should be pointed out that, at that time, there were still no ‘newspapers’ in circulation, and that books, newsbooks, pamphlets and some early newsletters were essentially the only printed media available. One of the first national newspapers was *La Gazette*, published weekly in France from the 1630s, but under the patronage and active collaboration of Cardinal Richelieu (i.e., as an expression of the state much more than of civil society). In Britain, the *London Gazette* was published regularly from the 1660s onwards and it was not until the end of the 17th century that there was an explosion of ‘coffee-house newspapers’ in the country. However, the first English newspaper with seemingly contemporary features, *the Times*, was not founded before 1785, while the press remained subject to censorship under the *Ancien Régime* in France.

Combined with a recent and less expensive typeface technology that had reduced, since the 1620s, manufacturing costs for books and pamphlets and with the turmoil that growing criticism of King Charles I was producing, this event triggered the multiplication of political pamphlets from 1642 onwards. As a result, an unprecedented public sphere came into being, one which was much more popular and long preceded that identified by Habermas (1962) as the bourgeois structural space for the emergence of modern public opinion; it involved hundreds of micro-ideologues and, indeed, masses of readers or recipients (pamphlets were attached to the walls of alehouses across the country) in the constitution of an ideological field with modern properties: a networked space of individual actors (mainly, ideologues from civil society) and institutional actors (royalists versus anti-royalist parliamentary factions) defining themselves relationally – by taking positions in relation/opposition to the others – and competing for the support of public opinion.<sup>3</sup>

Thus, the birth of the modern ideological field cannot be separated from the emergence of a relatively autonomous public opinion – that is, one which can form and express itself through the modern media – but also of a political space which in turn does not totally overlap with the state institutions. Indeed, early modern political groups were largely institutional – within the British Parliament, or the French National Assembly – with scant or no societal organisational bases, and each faction within these chambers represented more of a status than a political party (with the notable exception of the Levellers and Diggers in the Civil War, see section 5.3). It was with the French Revolution and, in Britain, during the first decades of the 19th century that political parties began not only to be clearly identifiable in parliament, but also to acquire an organisational basis in civil society through political associations, local committees, and public meetings. In other words, it is when politics emancipated itself from the state and spread into society that a fully accomplished logic of ‘ideological politics’ was established. In fact, while mere parliamentary decisions may reflect one or the other ideological principle, it is in the process of communication and political mobilisation aimed at obtaining the support of ideas from social

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3 The number of pamphlets – which were often written in response to other pamphlets – published in England burgeoned from around twenty in 1640 to nearly two thousand in 1642. On the emergence of the print media on the eve of the Civil War, see Siebert 1952, Harris 1995, Griscom 1996.

groups and citizens that modern ideologies were finally deployed in their distinctive form.

New agents (intellectuals, politicians, spokespersons for some professional category or local committee) specialising in the ‘preaching of ideas’ – ideologues – became the most typical and visible inhabitants of the modern *agora*, as Zygmunt Bauman (1999) described that intermediate social space between *oikos* (the private realm) and *ekklelesia* (the state) where private concerns can be transformed into public issues. And if the agora, like the square in the classical Athenian tradition, represents the public sphere, whose material infrastructure is civil society, and is therefore theoretically distinct from both the state and market, it is precisely in public squares that the city markets often take place. Hence, it is neither historically nor sociologically blasphemous to designate the ideological field with the metaphors both of a ‘market’ and a ‘public sphere’ (one that is partly independent from and partly dependent on state agents and institutions), just as the *agora* of Periclean Athens contained at the same time the political *ekklelesia* (state), the physical space for citizen discussion (public sphere), and the commercial market.<sup>4</sup>

When the modern idea of contingency found its way into the ‘practical reasoning’ of a growing portion of socially and politically enfranchised citizens, the expansion of the realm of decidability became virtually unlimited. Just as every political power needed – after losing its traditional sources of legitimacy – to justify itself in “rational-legal” terms, as Weber (1922) would have said, so any previous social truth could be, in principle, contested; it thus needed an explicit justification. The decisions (or non-decisions) of the state on property, war, taxes, trade, tariffs, labour regulations, poverty, censorship, grain prices, punishments for crime, adultery or homosexuality, and many other matters concerning the organisation of social life became subject to political contestation. Indeed, these practices became *issues* because they were no longer given or self-evident; some political agents had made them political and therefore, at the same time, divisive and susceptible to different decisions.

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4 The *agora* also contained temples for the veneration of deities, which also reflects – to maintain the metaphor of the *agora* and its possible meanings – the weaker functional differentiation characteristic of premodern societies.

It is, however, when a previously well-established social ‘truth’ is threatened by new groups or practices that the social strata concerned with its conservation will respond politically and, to the extent that public opinion is involved, ideologically, by celebrating this truth as a political value.<sup>5</sup> This can apply to ‘eternal’ truths such as God, the king, aristocracy, property, birth-right, as well as to traditional models of family, social stratification, gender relations, sexuality, and religiosity. Unlike the Marxian notion of ideology as an attempt to make appear universal, natural and therefore unitary what is, in truth, socially arbitrary because it is historically constituted, a political ideology is not a source of unity, but of division.

The ideological matrix of conservatism can be found in this attempt to restore principles that are no longer undisputed and which consequently require a discursive effort to re-establish their ‘naturalness’. In this sense, conservatism as a political ideology is always somewhat reactionary — it reacts to the threat addressed to a principle of unity by following the very principle of division that somebody else has introduced into social life. And if the ultimate hope of any ideology is, perhaps, to achieve unity — that is, to obtain collective consensus on its own vision of the social world — it is certainly by mobilising social groups along political lines of division that it operates on an everyday basis.

A political ideology, in sum, is the opposite of ‘culture’ in the sense of cultural anthropology, that is, a complex of practices, dispositions, symbols, and ideas widely shared by a collectivity. In this regard, culture can be seen a manifestation of ‘doxa’, an important concept that Bourdieu often used, not in the Platonic meaning of ‘opinion’, but in the phenomenological sense of a primary adherence to the social world: a tacit, immediate and pre-reflexive agreement of the agent with cultural norms and the social structures upon which they are based. If considered at the macro level of a nation or a geo-cultural area, culture functions as a principle of collective unity; it is even *holistic*, to the extent that each individual is, more or less unconsciously, permeated by its norms, be they appropriate public behaviour, mental forms of classification, positive dispositions and taboos (to be

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5 This point is brilliantly underlined by Pierre Bourdieu during one of his economic anthropology courses where, with reference to the Kabyles who began to speak of honour when honour was threatened, he recalls that “Values are all the more celebrated the more they are threatened; as long as they are obvious, they are so taken for granted that no one would dream of celebrating them” (2017: 53).

trivial but clear: virtually no one in a Western country would eat dog meat, for example, just as no Muslim or Jew eats pork and the Japanese would not eat rabbit).

This principle of intra-societal unity also operates in highly differentiated societies, which could not be maintained without a certain degree of social integration and residual “mechanic solidarity”, as Durkheim (1893) noted. In fact, modern societies are not characterised by only social differentiation, because a certain unity in perceptions, even more than in morality, is a condition of their own reproduction. When, however, a cultural norm begins to be problematised by some social actors who either violate it in their everyday practices or publicly denounce it as unjust, a new intra-societal division appears. And the whole *nomos* of society and politics can be seen in this continuous dialectic between a principle of unity and a principle of division.

But modern societies are characterised by ‘movement’, as Touraine (2019) recalls when he opposes them to societies of order, those traditional societies in which cultural norms remain essentially unchanged for centuries. And it is precisely because they are societies of movement that they produce change and create historicity, so that they also generate conflict. Conflict, in turn, is but another word for politics, the origin of which can always be found in a dividing line marked out in the public space, which replaces the agents’ silent adherence to social order in their private lives. But the breaking of the *doxa* that politicisation implies calls for the advent of ‘orthodoxy’, that is, a discourse that claims and recalls the norms that have been defied. Because these norms are no longer taken for granted, however, they must now be justified. An explicit justification – one appealing to nature, religion, reason, justice, freedom, etc. – needs to be spelled out. This is why not only liberalism, but also conservatism is a modern ideology: because ideologies are modern, they emerge with the change, and hence the division, inherent in modernity, and with the politically organised responses to this change.

Again, ideology is the opposite of *doxa*. But ideology is not exactly ‘orthodoxy’ either, at least according to Bourdieu’s definition. For the French sociologist, in fact, the discourse that follows the superseding of *doxa* tends “to impose an apprehension of the established order as natural (orthodoxy) through the disguised (and thus misrecognized) imposition of systems of

classification and of mental structures that are objectively adjusted to social structures” 169). It should be inferred from this that conservatism is an ideology which attempts to covertly re-establish people’s acceptance of social structures as a natural order. But neither ‘naturalness’ nor ‘misrecognition’ – two concepts still overly indebted to Marx – are strictly necessary here. Indeed, once the innocence of *doxa* – as regards, for example, power relations of status, class, gender, or race – has been stolen, and once the ‘natural’, taken-for-granted status of some principles has been eroded, the result is necessarily the entry of their defenders into the ideological field. Here, the truths are no longer implicit but have, on the contrary, a political status, because they have enemies who denigrate them and who advocate counter-truths. Therefore, political ideologies fight a symbolic struggle on an open battlefield where people’s perception of reality is, of course, a very important issue at stake, but where all armies, whether new or old, dominant or dominated, use the same arsenals of weapons. The processes of communication that Bourdieu has in mind, which are not radically dissimilar to those identified by Gramsci (1929-35) with the idea of a cultural war of position between hegemonic and counter-hegemonic forces, are clearly part of this arsenal that has been deployed, however, by both conservative and progressive forces throughout history.

## 2.2. The ‘post-doxic’ essence of modern ideologies

If *ideology* is conscious division, as opposed to the unproblematised unity of culture (understood at the macro-territorial level), one can think of a same belief as a form of cultural expression or as the result of an ideological mobilisation. The correct way of thinking about it depends on the context. For instance, the 2000 wave of the *World Values Survey* contained a question about agreement with the item “the wife must obey”. In Nigeria, 83% of the sample responded that they strongly agreed, while 13% simply said that they agreed. A remarkable principle of unity (96% consensus) was thus shown in the cultural dispositions of Nigerians towards the patriarchal family model. A similar pattern, only a little less uniform, also characterised the cases of Saudi Arabia and Indonesia, among the countries included in the survey. What we have here is much more the indicator of a cultural orientation than of public opinion and, even less, a political ideology. In fact,

survey questions are usually not even asked about topics whose answers do not capture variables (division, public opinion), but only constants (unity, collective attitudes). To be sure, societies that are premodern in several respects – socioeconomic development, secularisation, advancement of science and technology, etc. – are more resistant to social and cultural change, and thus much less likely to present the conditions for the emergence of a modern ideological field. However, the same agreement that wives should obey their husbands, like possibly any other question regarding how society should be organised, may reflect, in a different context, a ‘post-doxic’ ideological principle, one that results from exposure to the direct challenge of alternative models of family relations.

The hyper-traditionalist vision of the social world – including gender and family relations – advocated by ISIS since the establishment of its Caliphate in Syria and Iraq in 2014 must be seen, in fact, as the expression of a *modern* ideology. As paradoxical as this may seem, the modernity of such a traditionalist principle as female submission derives from the fact that this *social* principle of *vision* also becomes, in the case of ISIS, a *political* principle of *division*. The profoundly anti-modern and religion-based content that this organisation has propagated is utterly modern in its logic, even before its form. And it is so because it does not simply reflect a ‘common sense’ cultural orientation but, rather, an identity actively claimed in reaction and in opposition to another model: the liberal order of the secularised and morally ‘corrupt’ West.

This transition from a premodern doxa to a modern ‘post-doxic’ ideology results from the close contact with cultural otherness that modern flows of mobility and communications have made possible. From post-colonial migrations in France, Britain and elsewhere in Europe to study visits by Al-Qaeda elites in Western countries, the opportunities for a direct experience of the different, in some ways opposite, cultural models have expanded in recent decades. The cultural globalisation favoured by the new media (first cable TV, then the Internet and, later, social media platforms) has created similar conditions at the level of symbolic exchange. As early as the 1990s, Manuel Castells observed that globalisation, which included greater exposure to cultural diversity resulting from migrations and ICTs, was at the origin of an important mechanism: the proliferation of defensive reactions and identities as “refuge to protect against a hostile, outside world” (1997:

65). He also noted that new cultural codes were constructed – and, I would add, made political – out of historical materials such as “God, nation, family, and community” (ibid.).

It is in this historical context that the new political identity of the Islamic State, with its beliefs, its solutions, and its designated enemies, could emerge and give life to a modern ideological package pursuing a radically premodern social and moral order. And it did so in a largely modern form: a centralised state with the monopoly of coercion and the capacity to levy tax, and the use of modern media as channels for its ideological propaganda aimed at recruiting and mobilising activists, but also at influencing world public opinion. Its specific means, including terror, were but a further manifestation of an extreme form – totalitarian ideology – that ideologies more typically assumed in the twentieth century.

Mutatis mutandis, the ultra-conservative wave of ‘creationism’ in the United States responds to a similar ideological logic. The belief that humanity is created by God is but a cultural and ‘doxic’ expression until it is not only challenged by modern science, as it has been for centuries, but also threatened in its status of dominant, and even legitimate vision of the world. Indeed, the ideological ‘orthodoxy’ of the creationist response is activated as a form of “cultural backlash” which is, as in Norris and Inglehart’s (2019) account of Donald Trump’s presidential rise, the consequence of gradual structural changes (primarily demographic and educational) within American society. Those social strata that felt they were becoming a minority were therefore the target of both social mobilisation (from the Tea Party movement to the Christian Evangelical churches) and partisan propaganda (by the more conservative currents of the Republican party). Thus, creationism is a pre-modern item in a broader ultraconservative ideological package that is ‘out there’ in public opinion, in the ideological market, in the electoral supply of a (hyper-)modern society.

These two extremely different examples (ISIS and US creationism) thus conceal a very similar mechanism: they both suggest that, while conservatism as *doxa* precedes the emergence of a liberal ideology, conservatism as *orthodoxy* (or ideology), on the contrary, follows it. This is why, once again, conservatism – in the very heterogeneous articulations of its general matrix – is a fully modern political ideology, regardless of the more or less antimodern contents that it propagates. Indeed, it no longer presents itself

in the guise of naturalised common sense, but becomes a political endorsement (and grafted onto a more comprehensive ideological framework) of a belief, norm or value that has been challenged, threatened or denied. By whom? By social and political agents of modernity, with all the movement, change, and contingency that this brings with it.

But there are other important corollaries to this claim concerning modern contingency. As is well known, Max Weber associated the modern era with the idea of *disenchantment*, in the sense both of the triumph of secularised rationality over a ‘sacred’ representation of the world as an ‘enchanted garden’, and of the renunciation of the myth of eternal truth. Contingency implies, in fact, the awareness of the plurality of values, ‘gods’, and truths that coexist in modern societies. But how can ideologies, which are commonly seen as the quintessence of iron-solid belief systems, arise from such a generalised state of uncertainty? Again according to Weber, the response is that modernity entails a choice, an act of individual responsibility and awareness on the part of the acting subject between these alternative values, these opposing ideologies, these conflicting symbolic gods which, contrary to the God of the premodern era, continuously need to justify themselves and their truthfulness. Everyone is invited to find, and then to obey, “the *daemon* that holds the threads of his life” (Weber, 1919: 156).

The entire enterprise of modernity could even be seen as an ongoing effort to give an organised and coherent sense to a social world governed by contingency. On the one hand, as we have said, modern experience consists in a growing social differentiation, change of roles and norms, subjectivation, geographic and social mobility, exposure to otherness; on the other hand, it conveys a rational and scientific vision of the world which at the same time de-spiritualises and de-naturalises the social and political order. Modern political (and metapolitical) ideologies such as liberalism, republicanism, conservatism, nationalism, socialism, communism, and fascism fulfil the historical mission of providing internally coherent interpretive and normative systems able to confront contingency and thus provide new collective meanings and purposes.

The modern eradication of transcendent forms of legitimacy has required the development of new symbolic systems that help individuals organise how they interpret the social world, their beliefs about what it is and how it should be, their sense of belonging to a group characterised by a

certain collective identity (and not to others). In this respect, modern ideologies are the quintessence of modern politics, which, as Pizzorno (1993) observes, responds to an economic logic – pursuing interests – until a certain degree of political intensity is reached; thereafter, the logic of politics approaches the religious one. It is in this sort of sacralisation of politics that ideologies come to act as civil monotheistic quasi-religions propagating their respective absolute, albeit mundane (and not transcendent), truths. And if this radical meaning of ‘ideology’ seems to fit much better with the 20th-century totalitarian ideologies, a seed of it remains in every ideology of modern mass politics.

The process described above should clearly not be understood too schematically. Indeed, several caveats are needed, such as its duration over time (it unfolded slowly, in no less than three centuries); its cross-national variations (it was far from being linear and simultaneous across the European countries); and its scope among populations (initially it mainly concerned a few ideologues and then, even in the era of mass politics, it involved only a portion of more ideological citizens within the general public). However, what I am proposing here is not a historical reconstruction of the different steps in the process of ideologisation of modern societies. Rather, my goal is to delineate the sociological context in which the fundamental matrices of modern political ideologies were generated. These ideological matrices will prove useful for interpreting not only the programmatic positioning of ideologists and ideologues, but also the policies carried out by the rulers (regimes, governments, ministries) without explicitly declared ideological intentions.

In a totalitarian or authoritarian regime, such as National Socialism and Fascism, for instance, policies can be identified that reflect more a socialist or a conservative matrix, or a mix of both. At the other extreme, in a technocratic and allegedly non-ideological government, more liberal, conservative or progressive policies can be recognized from time to time. The resulting framework will certainly be schematic, that is, a parsimonious yet dynamic conceptual tool for the analysis of modern and contemporary political and policy spaces. In this respect, the intellectual enterprise of this book is in itself very modern, as is the entire logic of the social sciences, which respond to the rational need to give a certain epistemic coherence to a reality that would otherwise be too complex, idiosyncratic, and fortuitous to be serenely accepted by the inhabitants of Western modernity.

Before entering into the nature and contents of the various ideological matrices, some clarifications are necessary, not only on modernity as a complex and polysemic concept, but also on its relationships with post-modernity and, more generally, contemporaneity. At stake is the ability of these conceptual categories to travel through time and to prove capable of providing useful interpretations for present politics as well. The most typical objection to a theoretical framework that has its roots in a distant past is, indeed, its presumed inadequacy for explaining a present that is so inexorably new, different and ‘post-ideological’. I will argue, however, that the key concepts and tensions that have characterised different waves of modernity are fundamentally the same, albeit in some cases exacerbated and partially enriched with new ones, which still prevail in the present times. The realm of politics seems, in fact, very far from leaving the paradigm of modernity.

### **2.3. The double movement of modernity and its hypermodern radicalisation**

We have observed a first ‘tension’, or dialectic, of modernity that is crucial for understanding the origins of the ideological field: that between contingency and coherence. An ideological mode of thought arises from the psychosocial need to master reality when it is perceived as increasingly changeable and complex, and thus liable to produce a sense of uncertainty and a state of generalised confusion. The mechanism of causality in this case seems quite straightforward, with a sense of coherence provided by ideological systems that follow, and with an evident time delay, the modern spread of contingency through the double thrust of differentiation and rationalisation. The danger of an excessive contingency is, in other words, a cause of the affirmation of ideologies. But there is an even more general and fundamental tension that characterises the sociological idea of modernity, that between ‘centrifugal’ and ‘centripetal’ movements, which constitutes what I would term the ‘double movement of modernity’.<sup>6</sup>

A centrifugal movement towards not only greater social differentiation – a Durkheimian and structural-functionalist category that is always useful

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6 I borrow the image of a “double movement” from Polanyi (1944), who applied it to the dialectic between the expansion of the free market and the self-protection of societies.

– but also individual emancipation and the increasing autonomy of the acting subject is present in all intellectual analyses of modernity. Indeed, the idea of modernity as individualisation and subjectivation is an indispensable legacy of sociological and anthropological ‘grand theories’, such as those of Max Weber (“modern man is left alone with the individual responsibility of finding his own values”), Louis Dumont (“individualism is the modern ideology par excellence”), or Alain Touraine (“modernity brings the rise of the subject as a creative actor”). With all its positive corollaries in terms of individual freedom and self-determination, but also negative ones in terms of the lamented dissolution of communities and the increasing atomisation of individuals, especially in the accounts referring to the rise of mass societies in the first half of the 20th century, a further tension can be detected, as in a conceptual matryoshka doll, even within this centrifugal movement.

The centripetal movement of modernity has a more directly political origin: it concerns the rise of the modern state, with its progressive deployment of centralising elements such as taxes, an army, conscription, bureaucracy, police, education, language, nation and national symbolism. Subsequently, the state began to regulate industrialization by legislating on working times and conditions, worker housing, insurance, wages, as well as on transport systems and infrastructures. At a later stage of the process, it established a national welfare system and became, in many European countries, the owner of nationalised industries and services. Moreover, democratisation brought universal suffrage and the advent of mass parties, which fulfilled mass integration functions in spite of pursuing political and ideological division. Some historical junctures proved particularly prone to a centripetal push, such as the first systematic regulations of the free market at the end of the 19th century, the active intervention of the state in the economy after the great recession and after the Second World War. A clear standardisation of practices and life-courses resulted from this phase of “organised modernity” (Wagner 2012), which reached its peak, in many respects, in the 1950s.

This double movement of modernity is less paradoxical than it may seem, at least as soon as it is considered in its interaction, recursiveness and mutual causation. Certainly, there has been, on some occasions, a concerted political effort of state centralisation, with an attempt to impose principles of unity and homogeneity in an increasingly diversified social fabric. But

the state and bureaucratic centralisation are also, as we have seen, among the first drivers and meanings of modernity itself. Contrary to the clearer direction of causality found with regard to the tension between contingency and coherence, which more specifically concerns the socio-epistemic conditions for the rise of modern ideologies, this even broader sociological process should not be seen as a relatively linear historical sequence.<sup>7</sup> On the contrary, it seems to me that the logic itself of modernity can be grasped precisely in this continuous dialectic between centripetal and centrifugal movements and counter-movements, which reflects an ever-existing tension between the sociological principles of unity and division.

The fundamental question here becomes: is current modernity governed by a different or similar logic? The literature adhering to Lyotard's (1979) farewell to modernity and the advent of postmodernity has emphasised a radical discontinuity between these two epochs of human history, at least as regards "credulity in grand narratives" such as progress, rationality or wealth creation. 'Incredulity' towards these totalising meta-discourses with self-legitimising functions and a type of knowledge founded on a full acknowledgment of pluralities and differences would represent the quintessential 'postmodern condition'. On using the analytical lenses proposed above, we note that the postmodern age has seen the centrifugal thrust prevail over the centripetal one, the principle of division over that of unity. And even the most brilliant thinkers who have described postmodernity without believing in its radical discontinuity with respect to modernity, such as David Harvey, Ulrich Beck, Anthony Giddens and Zygmunt Bauman, have pointed to processes of individualisation, acceleration, increased volatility and ephemerality of human experiences and ideas.

However, what these accounts of the social transformations of Western societies have identified is a centrifugal movement which reflected a trend prevalent in the last decades of the 20th century, but which did not fail

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7 Peter Wagner (2012) identifies a first period of European modernity built on the liberal principle of individual autonomy until the 1890s, followed by a standardising modernity (second period) until its progressive dismantling from the 1970s onwards (third period). While this is an interesting generalisation, a more fine-grained reconstruction of the societal and political processes throughout modern Europe should probably focus on the tension between centrifugal and centripetal forces within each period. Indeed, it is difficult to overlook the centripetal process of nation-building at the heart of period 1, to which Wagner assigns only the centrifugal push of liberalism.

to generate a countermovement in the opposite direction. As a temporary pendulum shift towards a radical principle of division, it contained the dynamic energy necessary and, probably, sufficient to create the conditions for a countervailing shift in the direction of a principle of unity. Even more importantly, the countermovement is constantly operating, with greater or lesser force, within each movement, as in the afore-mentioned ‘matryoshka doll effect’. The tension between the opposing principles runs through each historical period, which can be portrayed as more favourable to one or the other tendency, but it always results from a provisional balance between the two. It would be a gross form of ignorance about contemporary digital societies, for example, to disregard the dynamics of polarization of opinion, selective exposure to information and filter bubbles, homophily in the use of social media, or mass belief in conspiracy theories that have been apparent since the early 2000s. However, these processes, which can also be seen as collective responses to societal, political and information environments characterised by growing contingency and, thus, uncertainty, are far from having been monopolistic in recent decades, since other dynamics – including more pragmatic attitudes resulting from cross-cutting digital exposure to culturally and politically diverse media sources – are also simultaneously at work.

In effect, during the same decades in which postmodernity, at the end of the millennium, seemed to thrive, the seeds for the growth of nativist forms of identity politics continued to be well watered. It was between the end of the 1970s and the 1990s that most radical right parties in Europe were either founded or began to gain broader support in countries like France, Italy, Belgium, Austria, and Denmark. The search for new forms of rootedness and new bases of social solidarity, not in a moral but in a Durkheimian sense, was also apparent in the affiliation to new collective identities such as those provided by pacifist and environmentalist social movements, or to more ‘neo-tribal’ identities furnished by youth subcultures and football hooliganism. On a more global scale, one should signal the growth of religious fundamentalisms in the presumed era of liberal irony (Rorty 1989), of weak thought (Vattimo 1988) and incredulity towards any ideological or totalising narrative.

These are all instances of a thesis: that so-called postmodernity does not entail a replacement of modern logic, but rather a radicalisation of

its double movement. On the one hand, there are centrifugal tendencies in terms of hyper-individualisation, radical subjectivation, self-actualisation in life and lifestyles,<sup>8</sup> up to the digital logics of micro-targeting, personal self-branding, and that sort of spontaneous ideology which may be named ‘myself-ism’; on the other hand, there are the formation and strengthening of group identities that refer to territorial (both subnational and national), ethnic, religious and other community-level symbolic roots and meanings. In fact, among the most extreme counter-movements against Western ‘post-modern’ incredulity one should not forget to mention Islamic terrorism.

But if there has been no paradigm shift from modern logic to the logic of contemporaneity, the latter should be called *hypermodernity* rather than postmodernity.<sup>9</sup> Just as speed and change, for instance, are two modern properties, so acceleration of speed and change are hypermodern ones.<sup>10</sup> Similarly, an exacerbation of the main mechanisms associated with the constitution of a modern ideological field involves the radicalisation of contingency and both the multiplication and acceleration of centripetal and centrifugal movements on different scales (from global to local, and in different domains of politics and society).<sup>11</sup> In effect, the extreme contingency and uncertainty of hypermodern societies provide the ideal conditions for

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- 8 Giddens (1990: 156) connected what he called “life politics” – or a politics of self-actualisation based on “an ethics of the personal” that aims to extend the realm of ‘freedom to’ which is fundamental to self-identity – to his conception of radical modernity, which he contrasted with post-modernity. In the logic adopted here, however, there is no appreciable difference between these two conceptions, which are both expressions of the centrifugal motion of hypermodernity. This is even clearer in Beck’s account of the “risk society” (1992: 88-91), in which the diversification, variation and differentiation of lifestyles and forms of life are seen as one of the main results of the individualisation processes of late modernity.
- 9 Alain Touraine (2019) also uses the term “hypermodernity”, which he understands however as a radicalisation of the modern project of “subjectivation” as the affirmation of the individual as a free, autonomous and creative being.
- 10 In his 1864 essay “The Painter of Modern Life”, Charles Baudelaire famously wrote that “modernity is the transitory, the fugitive, the contingent” and the “fleeting, ephemeral experience of life” associated with the urban metropolis.
- 11 As we will note in section 7.3, identity politics as a peculiar liberal/progressive fusion of claims for the recognition of group identities is also inscribed in a hypermodern development of the ideological field. Furthermore, as Beck (1997: 87) noted, a return to the ‘natural’ category as an antidote to scientific and scientised modernity may also be included among the counter-movements set in motion by the acceleration of modernity itself.

the production of both centrifugal/individualising movements and centripetal counter-movements based either on nativist or on egalitarian thrusts, or both.<sup>12</sup> And if a hypermodern logic seems to pervade the ideological fields of contemporary democracies, it is also because their public spheres are structured upon media systems in which the participatory dimension afforded by digital social media platforms is central. Hence, the discursive appeal of political actors to public opinion and, at the same time, the symbolic power of public opinion over political actors have arguably never been stronger. This leads us to consider the common-sense statement about the post-ideological nature of contemporary politics through different and much more critical lenses.

Overall, radicalisation of the double movement of modernity is, perhaps much more than the prevalence of the centrifugal movement over the centripetal one, the key feature of hypermodernity. To be sure, the contents of the drive towards subjectivity and individual freedom are more distinctly ‘modern’ in their contents than those, for example, of communitarianism or religious fundamentalism. However, as said, not only were these centrifugal elements compensated by the – also distinctly modern – centripetal elements linked to the affirmation of the nation state, with its political centralisation and symbolic unity (Reinhard 1996). Also communitarianism and religious fundamentalism must be seen, not as anti-modern resistances to modernity, but as essentially modern ideological resistances to the specifically centrifugal movement of modernity.<sup>13</sup> Being founded on politicised grievances and ‘post-doxic’ goals, these movements have the same formal properties as any modern ideology which exercises the societal function of organising contingency and responds to the psychosocial need to reduce uncertainty.

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12 Both types of centripetal thrust are liable to merge with populist counter-movements focusing on the essentially metapolitical question of the locus of political power, which should be removed from the liberal elites and returned to the sovereign people. The specific political-ideological outcome of this merger depends precisely on the definition given to ‘the people’, that is, one adopting an ‘in-out’ (nativist) or ‘bottom-up’ (social) line of division.

13 Even the religious wars that followed the Reformation were ‘ideological’ and, in this sense, modern, as remarked by Cranston (2014): “What is characteristic of the modern period is that the ideological element became increasingly dominant, first in the religious wars”.

What at first sight seems anti-modern, therefore, fully fits with the logic of modernity. When a contemporary far-right party like Spain's Vox fights a battle in parliament and across the country to block a (fully modern) law on violence against women on the grounds that it would criminalize men, it advocates a modern anti-feminist ideological position. It is only in societies where domestic violence against women is considered normal that agreement is pre-political, because cultural unity and implicit consent reign in the form of 'doxa'. The cultural appears 'natural', in a premodern knowledge of the social world. But in modern 'movement societies', societal transformations are always liable to give rise to organised responses to protect a certain type of social order, even while accepting some degree of adaptation to changing power relations (between genders, in this case) and self-affirming modern practices. In fact, this is the fundamental driver of the conservative ideological matrix.

When it is not a political party but state power that opposes, through government action and police repression, modern demands for individual emancipation and the acquisition of civil or political rights (from the British government against the Suffragette movement to the Chinese authority against young Hong Kong pro-democracy protesters), this can be seen as an authoritarian response in its form, but as a conservative one in the ideological goal of preserving a certain social and political order. But the context of contention is always that of a modern symbolic and physical struggle to define and redefine the boundaries of what is sayable, doable, and acceptable within society.

The common-sense claim about the post-ideological nature of politics in 'post-modern' societies can now be more critically discussed. Modernity as a project could very well have ended with the "age of extremes", as Hobsbawm (1994) termed the twentieth century between the First World War and the collapse of the Soviet Union. Only a few intellectuals have actively supported in recent decades the thesis propounded by Jürgen Habermas that the "modern project", understood as a universalistic impetus to the affirmation of reason, freedom, equality and democratic participation, is simply incomplete and deserves to be prosecuted. The modern idea of 'progress' may also have revealed its naivety and inherent dangers.<sup>14</sup> As Bauman (1999) wrote in an excursus entitled "Ideology in the Postmodern

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14 See Christopher Lasch's (1991) monumental critical analysis of the idea of progress.

World”, ‘big ideas’ are not needed in postmodernity because there are no credible ‘big tasks’ left.

However, two possible sources of conceptual confusion need to be removed. First, the modern project is not to be confounded with modern logic. The superseding of modernity as a normative project of human emancipation does not imply the superseding of modernity as an objective logic of historicity and societal transformations. Not only is modern logic based on a dialectic of centrifugal and centripetal movements and counter-movements still operative, but it also seems to have become radicalised in hypermodernity. Second – and this will be the main argument of a later part of this book – ideologies are not, or not only, totalising systems that pursue a distinctive type of organisation of society (only Marxism-Leninism can perhaps be defined in this way). If we think in terms of ideological matrices, we find a wide range of possible declensions of political tendencies that pursue a small number of fundamental aims within society. In this sense, we will argue that the polar stars – that is, the fundamental aims of the main ideological matrices of modernity – are largely still the ones around which the political struggle takes place within hypermodern societies.

While we have no empirical means to assess the differences between modern and hypermodern ideological modes of thought, we can put forward the hypothesis that a broader acceptance, or sometimes explicit assertion, of ideological diversity, plurality and even inconsistency within the same group or individual characterises more hypermodern than modern politics. I will refer to this tendency as an ‘interstellar’ *hybridisation*, a process leading to a sort of political grafting between two or more of the polar stars pursued by the main ideologies of modernity. This tendency to ideological hybridity is liable to translate into a politics of pragmatism, which nonetheless leaves any given political decision interpretable through the lens of one or another fundamental aim. There is no ‘pragmatic’ or technocratic government that implements policies which cannot be seen as serving a more liberal, conservative, or progressive purpose.

But more importantly, when it comes to the level of the single individual, this very hypermodern hybridity can be exhibited as proof of personal uniqueness, creativity, and authenticity. The ideal-typical hypermodern individual, in other words, is unwilling to buy not only an entire ideological package, but even a single predefined ideological matrix. After all, even

political communication messages in the era of digital platforms tend to be hyper-targeted on the personal profile of users. However, this hyper-subjective and personalised experience fits perfectly with the centrifugal movement of modernity and the emancipation of a knowing and acting subject who creates her or his own identity. But this movement is only part of the whole story of modernity – it fundamentally represents a development of one of the modern ideological matrices: the liberal matrix. Therefore, other counter-movements are always at work, whether latently or overtly (depending on where and when). And these hypermodern counter-movements roughly reflect the ultimate goals of the conservative and socialist/progressive matrices of modernity.

Both modernity and hypermodernity, from a certain point of view, can be seen as fields of tension between these opposing ideological matrices, the continuous outcomes of which reflect a dynamic balance among their respective polar stars (freedom, order and equality). The tendency of the liberal and individualistic ideological matrix to colonise modernity, both by becoming more and more self-evident ('doxic') in modern societies and by diluting the ideal-typical 'purity' of alternative ideological matrices, has always been followed by cycles of repudiation through the reestablishment of the modern polar stars of order or equality, or both. The ideologically liberal seeds of John Locke's natural rights to freedom, life, and property and Adam Smith's defence of commercial freedom and market self-regulation have never ceased to yield enormous political fruits throughout modernity. At the same time, this liberal movement of history has provoked a repeated backlash in the most extremely diverse forms of ultraroyalists, Marxism and the workers movements, pontifical social encyclicals, nationalisms, state regulation of markets and Bismarck-style state paternalism in the 19th century; the constitution of welfare states, fascism and nazism, the New Deal, post-World War II state interventions in the economy, far-left terrorism, religious fundamentalisms, authoritarian populisms, ultraconservative nativism, and neo-socialisms in the 20th and early 21st centuries. Of course, none of these historical phenomena has been solely the expression of an anti-liberal countermovement; nor have they been motivated merely on these grounds. But they all have in common, whether they have pursued a more egalitarian or more order-oriented ultimate goal, the repudiation of

the liberal ideological matrix in one or more of its political, economic and social consequences.

Therefore, even admitting that hyper-modernity tends to coincide with a movement towards the hyper-individualisation of the social world, which subsumes the legacy of a liberal ideological matrix, one must not lose sight of the more or less ephemeral moments of resilience by a principle of totality (or collective unity), on the one hand, and the formation of enduring anti-individualist counter-movements on the other, according to both a conservative and a socialist/progressive ideological matrix.

This also appears to be the social destiny of post-materialism, a value disposition associated more specifically with post-industrial modernity and its superseding of group conformity principles, whether based on social class or on corporate/bureaucratic hierarchical organisations.<sup>15</sup> Postmaterialist values emphasise individual freedom, self-expression, quality of life, and the recognition of identity minorities (even on the basis of lifestyles and sexuality) and their rights. As such, they also tend to replicate the liberal matrix and the individualistic (which is not the same as ‘selfish’) movement of modernity. But given that the rise of post-materialism is closely linked to a country’s level of socioeconomic development, and that an individual’s propensity to espouse postmaterialist values is strongly associated with his/her cohort, education, and income, the backlash of ‘materialism’ – the primacy accorded to existential and economic security – is an ever-present possibility. And if each cohort since the 1970s seems to have been a little more post-materialistic than the previous one, this process of socio-cultural ‘modernisation’ is far from representing a linear societal evolution.

On the one side, any context of deep crisis – an economic recession, a pandemic, a catastrophe, a war, a cycle of terrorist attacks – tends to shift public salience and political importance towards materialist concerns about economic and even physical survival. On the other side, opposition to the hegemonic tendency of postmaterialist and socially liberal values can be organised politically and give rise to ‘cultural backlashes’ such as those represented by the successes of Brexit and Donald Trump (along the conservative matrix) or, in European contexts with a less established

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15 See Ronald Inglehart’s *The Silent Revolution* (1977), but also, more closely related to the idea of ‘modernization’, the book (2005) by Inglehart and Welzel which posits a “sequence of human development” towards the diffusion of post-materialist values.

liberal-democratic tradition, Viktor Orban's leadership in Hungary and the ruling Law and Justice party in Poland.<sup>16</sup> But the rise of new materialist demand can also be grasped along the progressive/socialist matrix by more egalitarian forces with a more or less accentuated populist inclination, such as Spain's Podemos, Jean-Luc Mélenchon's La France Insoumise, Jeremy Corbyn's Labour Party, Bernie Sanders' current in the US Democrats, and the Five Star Movement in Italy. The double movement of post-materialism and materialism, in other words, seems to be a more faithful image of late modernity than the rise of post-materialism alone. And again, if post-materialism is to individual freedom as materialism is to public order and a reduction of economic inequalities, it is this dynamic balance between a more centrifugal (freedom) and a more centripetal (order/equality) movement that seems to act as a driving mechanism of modern and hypermodern politics.

## 2.4. The farewell to ideologies as a historical parenthesis and intellectual blunder

My refutation of the thesis of a post-ideological politics in post-modernity is perhaps now clearer, given the strong continuity that I have tried to show between modern and hypermodern logics of 'historicity'. There has been no paradigm shift between modernity and hypermodernity. If "the way out of the legacy of modernity will be a difficult process", as Alberto Melucci (1996: 72) predicted, it is due less to the analyst's intellectual laziness than to the objective endurance of the modern legacy itself. A new paradigm for hypermodern post-representative politics has not yet been invented. The existing political institutions are still those of modernity, and even the main challenges to the modern principle of representation derive

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16 The fact that Orban's Fidesz party belonged, until 2021, to the European People's Party (EPP) while Law and Justice was part of the group of the European Conservatives (ECR) in the EU parliament is just another manifestation of the porosity of the ideological space broadly defined by the conservative matrix, which in its radical form can extend to the parties in the "Identity and Democracy" (ID) group. This is the case, for instance, of the first Kurz government (2017-19) in Austria, which was based on the coalition of the People's Party (ÖVP-EPP) with the Freedom Party of Austria (FPÖ-ID); but also of the structural alliance in Italy among Silvio Berlusconi's Forza Italia (EPP), Matteo Salvini's Lega (ID) and the national conservative Brothers of Italy party (ECR).

either from populist impulses, which draw on Rousseauvian conceptions of direct democracy and popular sovereignty, or from institutional designs aimed at implementing deliberative or participatory democracy, which are nothing more than the realisation of Habermas's "unfinished project" of modernity.

Likewise, observing that we have not moved out of economic modernity either, because the main paradigm is still based on the capitalist 'mode of production', should sound less Marxian than simply realistic. Neither the financialization of the global economy, nor the formation of a flexible labour market, nor the platformisation of digital technologies, are taking place outside the paradigm of capitalism. Moreover, the principle of who owns and who does not own the means of production – material or immaterial, such as social media content – remains quite decisive, not only in differentiating between big business owners and manual workers, but also between small self-employed proprietors and public/private (both non-proprietor) employees. Hence, the question of private property/ownership, which was addressed and affirmed by the 'modern constitution' of the 17th and 18th century (from John Locke to the French Revolution) is still a dividing line along which the ideological matrices of modernity inform the policy space and orient the political struggle.

When we look at the contents of the main issues on the agenda that focus on the *'quid'* of politics – that is, which aim to regulate social life through institutional means – these issues can essentially be seen as manifestations or declensions of those that constituted politics in the first modernity: international commercial freedom versus protectionism (mercantilism); free market versus state regulation; the issues of taxation and economic redistribution; security and public order policies; public services and social protection; and the battle around the extension of new rights. When modern and contemporary issues are analysed in terms of the fundamental ideological goals that the different political forces are serving, their lowest common denominator will often appear to be the same.

If there is a clear continuity between the categories and institutions of modernity and contemporaneity, there are also good historical reasons for reformulating the post-modern 'farewell to ideologies' as an intellectual blunder. After the collapse of the Soviet Union, a new and relatively short era of history began; it saw the advent of a unipolar international system

of which the United States was the leading and undisputed actor. But this actor also represented the archetype of a politically liberal-democratic and economically capitalist order, which we recognise as a descendant of the modern 'liberal' ideological matrix. The United States itself initiated the latest wave of globalisation and dictated its principles ('Washington consensus', free trade) as a hegemonic power.

It could be argued that, as a general rule, the pre-1989 bipolarism produced a simplification of the ideological system because the pressure of the international system on the medium and small powers forced them to take sides along simplified and dichotomous ideological lines. But while a bipolar international system produced a bipolar ideological opposition between left and right, a unipolar system now favoured the attraction of opposing ideological positions towards a same centre of gravity. The main forces of Western European conservatism had already begun to converge on this model at the beginning of the Cold War, but a similar convergence has now also been achieved by the progressive forces – be they post-communist or social democratic.

This ideological convergence of the conservative and socialist/progressive traditions around a generalised liberal-democratic consensus was therefore the objective consequence of a new world order in which no serious alternatives to the hegemonic model seemed to exist. Fukuyama's famous statement (1992) about the end of history originated precisely from this context of structural impossibility for the main national actors of the left and right to pursue realistic ideological objectives that could conflict with free market/free trade (in the case of excessively egalitarian objectives) or with liberal democracy (for those intending to establish a stronger national order), or with both. Indeed, none of these actors could have found sufficient political legitimacy and international support. Thus, a form of ideological convergence characterised progressives and conservatives in the 1990s and early 2000s: both had absorbed and embraced the dominant liberal model.

The intellectual error, however, consisted in the absolutisation of a historical context which, in less than two decades, would prove to be a temporary exception. Starting with the symbolic challenge launched by al-Qaeda in 2001 against the American hegemonic order, but especially after the 2008 recession, which caused a loss of US economic power and had strategic

repercussions on the game of international relations, the unipolar system was followed by the emergence of an increasingly multipolar system animated by different national and supranational actors such as China, Russia, India, the EU, and Turkey. With each of these (with the exception of the EU) pursuing political and meta-political projects other than liberal-democracy – be they authoritarian, conservative, nationalist or, at least nominally, communist – the new system no longer pushes the generalisation of a single hegemonic model but, on the contrary, leaves each country freer to pursue ideological variables which reflect national particularities. Like the multipolar order of empires before 1945, the neo-multipolar system loosens international constraints on endogenous ideological developments within national contexts.

Largely underestimated by customary analyses of the ideological systems, the international variable provides a strong structural framework within which to gain better understanding of global ideological cycles. This perspective also helps to move the analysis of contemporary ideologies away from an evolutionist approach that sees ideologies as inexorably linked to modernity and predicts, on this basis, an increasingly post-ideological post-modernity. On the contrary, new forms of ideological fragmentation and polarisation should be expected from the current multipolar trend of the international system.

Moreover, a political economy of ideological systems is necessary to understand under what conditions national ideological fields are more or less likely to polarise or converge. It can be hypothesised that periods of economic growth favour ideological convergence towards the predominant goal of the time, be it the post-war consensus on mixed economies in most Western countries in the 1950s or the liberal aim of global competition in the 1990s. Cycles of economic prosperity tend, in other words, to turn political principles of division into social principles of vision, which is precisely the reverse of ideologisation. This implies that political forces embedded in alternative ideological matrices temporarily lose sight of their respective 'polar stars'.

Conversely, economic recessions tend to generate more divisive societal contexts in which a major symbolic struggle concerns the attribution of political responsibility, which in contemporary mixed market economies can typically be addressed either to the state or capitalism (through the

accusations, respectively, of the inadequacy of the state in the management of the economy and a ‘capitalist crisis’ such as a stock market crash or the explosion of a financial bubble). It is in these contexts of economic emergency and political division that ideological entrepreneurs can wave the alternative banners of order and equality with the greatest chance of success among public opinion, or combine them into a radically anti-liberal message. As already noted, compelling examples are the economic upheaval of Europe after the First World War and, even more so, the great recession of 1929, as well as the financial crisis of 2008 and the subsequent ‘austerity’, especially in EU countries.

The combination of the emergence of a multipolar system and a severe economic recession, together with the Syrian civil war, the constitution of the Islamic State and the rise of international terrorism, the resulting refugee crisis and new migration waves to richer countries, has led to considerable resilience of the conservative and progressive/socialist matrices in Western politics. Rather than merely radicalising themselves, the political forces that represent these ideological matrices seem to have brought them back to a ‘purer’ state, albeit in ever-evolving forms, by resuming the chase of their original polar stars. Hence, mainstream parties of the left and right have experienced, sooner or later in the 2010s, a certain return to their ideological roots, whether in their party leadership, platforms, policies or alliances. This has also made the ‘third’ nature of the liberal matrix more visible, and its principles are no longer so widely shared and well established in the ideological field of most Western democracies.

From the ranks of conservative families, new political forces or currents arose, under the pressure of a growing radical right, in opposition to the liberal-conservative ideological alliance and in favour of a more resolutely populist and nationalist line. When these trends did not give birth to new parties (such as the Spanish Vox and the German AfD), they took over the leadership of existing parties, such as the Austrian People’s Party, Law and Justice in Poland, Fidesz in Hungary, but also the Republicans in France, the Tories under Boris Johnson, not to mention Donald Trump’s Republicans. At the same time, the egalitarian star began to shine stronger among the progressive forces, which often revived a socialist soul – a good indicator of this being the platform of the European Socialist Party in the 2019 European Parliament election – for decades acquiescent to the

dominant liberal imperative, but which also exposed themselves to greater ‘contamination’ with populist rhetoric or politics, as in the cases of the Democratic Party’s alliance with the Five Star Movement in Italy and that of the Socialist Worker’s Party with Podemos in Spain.

The new context generated by the vast consequences of the 2008 crisis, apparently more favourable to partisan fragmentation and ideological polarisation, demonstrates that the post-modern superseding of political ideologies was a historical parenthesis more than an ineluctable trend. However, the same observation could also apply to the rediscovery of the original polar stars of modern political ideologies in the following decade. A new restructuring or, possibly, de-structuring of the ideological field might follow, for instance, the 2019-2021 Coronavirus global pandemic, and thus reveal the volatility of the trends mentioned above. While we must certainly not make the same mistake of ‘absolutising the present’, it should be clear from the entire chapter that my interpretation of the political field in the 2010s must be set within a more general conceptual framework that focuses on a dynamic relationship between types of historical contexts and ideological cycles. Furthermore, one of the theses of this book is that contemporary hypermodernity is essentially a radicalisation of the ‘double movement’ of modernity, which rests on a continuous dialectic of centripetal and centrifugal historical forces. The concrete events of these years, therefore, are only some of the possible manifestations of this mechanism of ‘historicity’.

Secondly, the emergence of new ideological currents, such as those represented by animal rights activists, anti-vaccine campaigners, and adherents of various conspiracy theories, could also challenge the idea of a generalised return to the ideological matrices of modernity. While the hypothesis that hypermodernity brings with it new ideologies is interesting enough to be maintained as an ever-existing possibility, I will suggest that we first consider another possible option: that most of these seemingly new political ideologies can either be analysed in terms of their fundamental ‘polar stars’ and thus traced back to one or the main matrices of modernity; or they can be considered as meta-political rather than properly political ideologies.



## Chapter 3

# Reconstructing the conservative matrix of order

### 3.1. The social anthropology of the modern conservative matrix

A first component of ideologies is a fundamental conviction, or set of beliefs, about the essence of the social world. These include ‘anthropological’ beliefs concerning human nature – is it fundamentally good, bad, or ambivalent? And is it modifiable/perfectible or destined to remain intact as a genetic inheritance? – without, however, being reduced to it. A more important basis for the development of an ideology consists in a person’s or group’s perception of social relations: are they seen as fundamentally governed by violence, abuse, selfishness, trust, cooperation, competition, or other possible principles of social interaction?

This fundamental view of the social world must not be seen as the result of an individual psychological inclination equally existent, and even equally distributed in societies across time and space. On the contrary, such a view is part of a system of dispositions and forms of classification that are profoundly social, in that they reflect the social structures (institutions, economy, demographics, family, gender roles, etc.) and symbolic systems (religion, myths, rituals, cultural production) prevalent within a given society or social group. While in certain societies a principle of unity prevails for virtually the entire population – everyone sees, for instance, human beings as necessarily submissive to God – in more highly differentiated societies the citizens’ schemes of perception are organised according to a principle of division that reflects the social and cultural properties of different groups. In other words, how a person views the social world depends on the interplay between macro-cultural orientations and group-specific

dispositions which are, in both cases, socially constituted far more than individually self-generated.<sup>1</sup>

Each ideological matrix of modernity rests on a specific set of beliefs about the social world and social relations – not normative beliefs about how these should be (which is an additional component of ideologies), but more ‘ontological’ beliefs about how they are. In order to reconstruct the specific beliefs at the origin of each ideology, it is necessary to rely on the writings of those ideologists – be they political philosophers, statesmen or politicians – who have been particularly influential in defining a matrix. And to understand the nature of what we call, for the sake of convenience, the ‘conservative’ matrix of order, it is necessary to go back to the dawn of the logic of political modernity, and in particular to the origin of the idea of sovereignty.

It is undoubtedly in Thomas Hobbes’ political philosophy that we find the most influential treatment of this *problématique*. Contrary to the idea of a self-justifying absolute power, but also in opposition to the excessive plurality of powers (feudal, ecclesiastic, and corporate) prevalent in the medieval age, Hobbes sought to establish the legitimate principles of a unitary central state completely sovereign over its territory — what we understand today as a modern state. According to Hobbes (1651), the modern sovereign state finds its legitimate and rational foundation in a social contract – a “mutual transferring of rights” – which allows the “natural condition of mankind” to be overcome.

A person’s or group’s beliefs about the ‘state of nature’ discloses their perception of the ultimate essence of human relations and the social world; as such, it is key to our comprehension of the pre-political bases of an ideology. Hobbes sees men “as continually in competition for honour and dignity” and, therefore, liable to generate “envy and hatred, and finally war” (1651: 114). And even when people make use of reason, those who deem themselves wiser and better able to govern “strive to reform and innovate, one this way, another that way” (*ibidem*), with civil war as the always possible outcome. As stated numerous times throughout *Leviathan*, therefore, the natural human condition is that of a “war of every man against every

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1 The view stated in this book of the origin of human beliefs and dispositions reflects in turn a specific point of view within the sciences, that of the social sciences and, more particularly, of sociology, which claims a sort of legitimate epistemic primacy in knowledge about the social world.

man”, a war of “all against all”, of “each against every one”, of “every man against his neighbour”. But since people are deeply afraid of this permanent state of war, this *bellum omnium erga omnes* which is the best reflection of the state of nature, they cede their right to govern themselves to a sovereign power, a “Mortal God” to whom they owe their peace and defence. This relationship of protection and obedience – *protego ergo obligo* – is therefore the basis of the logic of the modern state.

A clear ‘anthropological’ pessimism not only about human nature – in the wake of the realist tradition of the *raison d’État* – but also about social and political relations at the dawn of modernity informs, in sum, Hobbes’ political philosophy and spontaneous sociology. Although his purpose was certainly not to write the manifesto of any ideology, and Hobbes is not included in the usual ‘pantheon’ of conservatism’s founding fathers, I argue that it is precisely by inspecting his view of the social world that the fundamental psycho-social engine of political conservatism can be found. Indeed, the preservation or restoration of social and political order can be seen as the ‘polar star’ of the conservative matrix. But to achieve this goal, preliminary work of guaranteeing the physical existence of citizens must be carried out by the “security state”, of which the most essential institution is, as Schmitt (2008: 48) observed, the police, to the point that “modern State and modern police came into being simultaneously”.

Of course, all ideologies (with the exception of anarchism) accept the need for the state’s coercive power, that is, a monopoly on the legitimate use of violence, which is nothing more than the sociological definition of the state. But in the anthropological assumption from which Hobbes starts there is something more than simple acceptance: there is the invocation of a sovereignty to which the guarantee of existential security must be delegated. And since, according to a ‘polar-star’ approach to the study of ideologies, what matters for the definition of an ideological matrix is the emphasis, the degree of priority given to a social objective, it is in this particular emphasis on order and security that we can identify a generative principle of conservatism. In the social premises of the doctrines of the state propounded by Thomas Hobbes and, subsequently, by Carl Schmitt we can grasp not only the nature of state sovereignty, but also the seeds of conservatism in its ‘pure’ form, one that has not been ‘contaminated’ by metapolitical liberalism and which, therefore, also encompasses authoritarianism.

In Hobbes' perception of the social world, which was shaped by his experience of the civil war that was taking place in Britain in the years (1648-1651) in which he wrote *Leviathan*, the primary concerns were "the invasion of foreigners" and "the injuries of one another" (1651: 170). The only defence against these threats to existential security is to confer all the "power and strength upon one man, or upon one assembly of men, that may reduce all their wills, by plurality of voices, unto one will" (ibid.). Although this theory provides the basis, in principle, for any sovereign power, *Leviathan* was written – as Hobbes himself pointed out many years later – "in the behalf of those many and faithful Servants and Subjects of His Majesty, that had taken His part in the War, or otherwise done their utmost endeavour to defend His Majesty's Right and Person against the Rebels" (1680: 19-20).<sup>2</sup> Significantly, Hobbes would also stigmatise, in addition to the "the Great Crime" of killing the king after hunting him "as a Partridge in the Mountains", the crime of altering "the Church-Government (the King being Head of the Church of England)" by making "Directories [i.e. governments] without the King's Authority" (14).

Hobbes' doctrine of the state was directed, as he wrote in his late *Considerations* (1680: 25), "only to the King's faithful Party, and not to any who fought against him". However, his continued references in *Leviathan* to the "Assembly of men" as the new Sovereign ("sovereign power, whether placed in one man, as in monarchy, or in one assembly of men, as in popular, and aristocratical commonwealths" (1651: 138) can be seen – despite Hobbes' disdainful denials, which sound like a posthumous *excusatio non petita* – as a consequence of the fact that Oliver Cromwell's Commonwealth of England was established in 1649, after the execution of the King. Once the doctrine of the divine right of kings had been irremediably destroyed, Hobbes strove to replace it with another foundation for the legitimacy of absolute power, which he found in fear or, as Schmitt (2008: 92) put it, "the terror of the state of nature [that] drives anguished individuals together".

When viewed in these terms, Hobbes' *relation of obedience and protection* provides an important theoretical basis for a modern ideological matrix that is primarily concerned with the objective of maintaining or restoring

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2 Its formulation did not displease King Charles II who, brought to power after the end of the civil war, called Hobbes (who had served as his tutor during their exile in Paris) to the court and had him awarded a pension.

a certain social and political order, of which the King-Church binomial remains the archetypal expression. But the same ideological matrix is, in the pure type of conservatism, also ready to accept other forms of less-than-absolute power that can guarantee as much as possible the old social *status quo* through new political means. For this reason, an ideological matrix can travel across time much more effectively than a political ideology. Three centuries later, historical manifestations of conservative dictatorships (Lipset 1959) or conservative authoritarian regimes (Linz 2000) could be found in several cases, although very different from each other, including those of Austrian clerical conservatism (1934-1938) and Spanish Francoism (1936-1975).

It is important to underline that the conservative matrix has its roots in this first phase of political modernity, when the traditional sources of legitimacy of the absolute order were seriously questioned for the first time in England. It was in 1628 that the Parliament first opposed arbitrary royal power by having the Petition of Rights accepted by Charles I, and parliamentary criticism of the monarchy increased during the Long Parliament which began in 1640. These first modern forms of questioning of the legitimacy of the monarch's power induced Robert Filmer, a royalist theorist, to write during those decades a treatise, *Patriarcha* (published posthumously in 1680), to justify the king's absolute authority as founded on divine right and derived from the patriarchs of the Bible (from Adam to Noah). But it was during the restoration period (1660-1680) following the Republic and Cromwell's protectorate that Toryism emerged as a conservative movement (Eccleshall 1990) or, as we should say, a countermovement defending the prerogatives of the King, rejecting the authority of parliament and supporting a social order founded on traditional hierarchies. As already said, the conservative matrix is, in its purest expression, counter-revolutionary and reactionary. In fact, the Tories of the time opposed the idea that sovereignty derived from the people and supported an absolute monarch who ruled by divine right. After the events known as the Glorious Revolution in 1688 and the Bill of Rights in 1689, the metapolitical question of recognising the prerogatives of the parliament and the limits to monarchical power was resolved once and for all, at least in Britain. Given that many different institutional arrangements can derive from the same matrix, the conservative

matrix henceforth adapted to the framework of constitutional monarchy, when and where it was present.

### 3.2. The liberal metapolitical dilutions of British ‘conservatism’

It is Edmund Burke who, living a century after Hobbes, is customarily considered the spiritual father of British conservatism. However, Burke’s conservatism had already incorporated the metapolitical liberal matrix institutionalised with the Declaration of Rights. And, importantly, he belonged to the more liberal-constitutional Whigs (and not to the Tories). In his famous pamphlet *Thoughts on the cause of the present discontents* (1770), he wrote a powerful *plaidoyer* in favour of the intermediate institutions and representative bodies between the court (so as to prevent “the unlimited and uncontrouled use of its own vast influence, under the sole direction of its own private favour”: 79) and the people. A few years before the United States Declaration of Independence (1776), which would serve as a referent for modern representative liberal democracies, Burke defended the House of Commons as an independent and intermediate institution representative “of the Nation”, which was designed not as a “controul upon the people”, but as a “controul *for the people*” (1770: 118). In the metapolitical terms of *quis*, *quantum* and *quomodo* of the exercise of political power, Burke’s liberal-constitutional imprint was clear. The power of the monarch must be limited by the intermediate body of parliament, through which popular control is exercised.

At the same time, as a Whig, Burke is known for inspiring the successive re-founders of the modern Conservative Party of the 19th century (from John Peel in 1834 to Benjamin Disraeli in 1868). As such, he is currently regarded as the main founder of conservatism. But his political identity seems to have been always split between a more conservative and a more liberal component, just as his social origins and status were also mixed: an Irishman in London, born to a Catholic and an Anglican parent, he would buy a large property with a loan that he could never repay. Karl Marx, in a footnote of *Capital*, even described him as a mercenary, a “vulgar bourgeois” who “in the pay of the English oligarchy played the romantic *laudator temporis acti* against the French Revolution just as, in the pay of the

North American colonies at the beginning of the American troubles, he had played the liberal against the English oligarchy” (1887: 659). Above and beyond Marx’s animosity, it seems clear that both Burke’s political views and social ‘habitus’ are more hybrid than ideal-typical of any ideological matrix.

Overall, Burke should certainly not be reduced to being the choirmaster of the conservative ideology. Alongside those who have seen him as an opportunist, many others have hailed him for his ‘pragmatism’. And still others have considered that the function of this supposed pragmatism was to better serve a specific social order. For instance, in his retrospective account of the events preceding the Glorious Revolution of 1688, written in 1790 as *Reflections on The Revolution in France*, Burke noted that the old Tories were in favour of maintaining certainty in the monarch’s line of succession, even at the cost of having a Catholic king (James II), who would possibly lead the country into a new civil war. But it was the Whigs that prevailed a few years later, with the accession to the throne of the Protestant King William, of the Orange family who ruled ‘liberal’ Holland. Thanks to this “small and temporary deviation from the strict order of a regular hereditary succession” (1790: 15), the country was able to prevent “its religion, its laws and its freedoms” from being endangered. Mannheim (1936) even thought that it is exactly this institutional pragmatism – which induced Burke to state, in his *Reflections*, that the science of writing or reforming institutions is “not to be taught a priori” (1790: 51) – that has “immediately evident sociological roots”: “it expressed the ideology of the dominant nobility in England and Germany, and it served to legitimize their claim to leadership in the state”; as such, it is “intended to justify government by an aristocratic class” (107).

While Marx considered him an “out and out” bourgeois and Mannheim assimilated him with the aristocrats, it is probably in the combination of two distinct social and political identities that Burke’s ideological profile is to be found. From the point of view of the search for his political ‘polar stars’, two principles may be identified that best embody Burke’s political philosophy: ‘liberty’ and ‘heritage’. The former deriving from the liberal matrix, the latter from the conservative one, these two principles are merged by Burke into a unified ideological discourse which refers to “our liberties as an entailed inheritance derived to us from our forefathers” (from the Magna Carta to the Declaration of Rights) and claims a national identity

based on “an inheritable crown” and “a people inheriting privileges, franchises, and liberties from a long line of ancestors” (1790: 28).

Therefore, contrary to the ‘pure’ conservative matrix – for which the establishment, preservation or restoration of a strong and undisputed political order is at least as important as the maintenance of a certain social and moral order – Burke was interested primarily in preserving an order based, among other things, on “the solidity of property” and “morality and religion” (1790:8), but within the framework, as observed, of a liberal constitutional monarchy. His ideas in the economic field also reflected the strong pro-free trade orientation of what would become known as “the ‘classical’ school” of economic thought of Adam Smith, with whom he had a relationship of mutual esteem, to the point that the Scottish economist remarked that Burke was “the only man I ever knew who thinks on economic subjects exactly as I do”.<sup>3</sup> Therefore, Burke should be regarded as a founding father of a hybrid liberal-conservatism which closely reflected the historical specificity of the British case, and which also provided the basis for the development of a liberal-conservative symbiosis in the future political history of the United States.

The mistake of taking a specific ideological position, such as Burke’s liberal conservatism, as representative of the whole ideology (conservatism) is a dangerous intellectual ‘synecdoche’ that continues to generate serious misunderstandings. A typical example is provided by the *Economist*, which was founded in 1843 by James Wilson, a Liberal member of parliament and businessman who opposed the protectionist (and conservative) Corn Laws and advocated free trade. As a magazine whose ideological identity can be traced back to the liberal matrix, but which has always leaned towards conservative political forces as opposed to socialist ones, the *Economist* has an interest in ensuring the maintenance of the conservative-liberal alliance. In 2019, the magazine published a ‘leader’ article entitled “The global crisis in conservatism”, in which it declared that “today’s right” (from Donald Trump to Jair Bolsonaro, from Matteo Salvini’s League to Alternative for Germany, from Viktor Orban to Poland’s Law and Justice, but also from the French Republicans to Boris Johnson’s Conservatives) “is not an evolution of conservatism, but a repudiation of it”.

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3 Cit. in West 1976: 201.

This statement is justified by the *Economist* not only with due reference to Edmund Burke's 'conservative' principles, but also on the grounds of a historically very reductive and purely psychological definition of conservatism, provided by the British philosopher Michael Oakeshott (1956), according to whom being conservative is a disposition rather than an ideology: "To be conservative [...] is to prefer the familiar to the unknown, to prefer the tried to the untried, fact to mystery, the actual to the possible, the limited to the unbounded, the near to the distant" (78). Although this personality trait may have characterised a certain type of British conservative citizen of certain social strata a little more often, particularly at a certain time in contemporary history, such a definition is completely useless for the purposes of recognising and understanding political positions and policies in the ideological field over time.

To make matters more confusing, the magazine's leader adds that "like classical liberalism, conservatism is a child of the Enlightenment", which is only true to the extent that conservative ideology is objectively, like any ideology, a 'child' of modernity, but which becomes false as soon as its historical origin is agreed to be a 'countermovement' to anti-monarchical pushes in England and, subsequently, the spread of the Enlightenment in France and elsewhere.<sup>4</sup> If, instead of conflating conservatism with liberalism as a means to promote the magazine's own ideology, conservatism were taken more seriously in the origins and nature of its ideological matrix, the contemporary examples of the new right mentioned above could be described more correctly as different and yet possible conservative manifestations of a 'purer' type, that is, not entangled with metapolitical or political liberalism. In other words, rather than as a repudiation of conservatism, these political forms should be seen as an archetypal conservative repudiation of liberalism.

Furthermore, when conservatism is associated – again in the misconception of the *Economist* – with pragmatism and moderation, these qualities should not be seen as a property of a specific ideology, but as dimensions that are orthogonal (moderation) or antithetical (pragmatism) to all ideological positions. On the one hand, in fact, there can be more radical and

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4 It is a textbook evidence that "Conservatism became a key part of the Counter-Enlightenment which challenged many of the ideas of liberalism, in particular its abstract individualism, its universalism, and its demands for equality" (Gamble 2010: 82).

more moderate expressions not only of a conservative ideology, but also of a socialist/progressive and liberal one; on the other hand, a pragmatic *modus operandi* excludes, by definition, an ideological one, if one shares Giovanni Sartori's (1969: 408) understanding of ideology and pragmatism as polar opposites (the latter being characterised, contrary to the former, by "low affect" and "open cognition"). Therefore, if the political tradition of British conservatism may, at certain times, have coincided with a generally 'moderate' and, on certain issues, 'pragmatic' attitude, this certainly does not mean that pragmatism and moderation are universal properties, or even tendencies, of the conservative ideology.

To conclude, a more accurate reconstruction of the original ideological matrix of modern conservatism is possible by focusing on the political context of Hobbes' England, rather than on Burke's. But what we have analysed so far is only a preliminary definition of conservatism as an ideology that pursues order as its polar star. In order to gain a more thorough historical and sociological understanding of it and its relation with the rival ideological matrices, it is necessary to consider a second decisive moment: the French Revolution and its long-lasting consequences in the realm of political ideas and practices.

### **3.3. The counterrevolutionary genesis of the conservative matrix**

If we were to define conservatism by antithesis, we would say that it is the opposite of what the French Revolution represented from the standpoint of a principle of order. Indeed, it caused the disruption of the political order (the absolute monarchy), the social order (the aristocracy) and the moral order (the Catholic Church) simultaneously. Hence, although conservative ideology would assume very different forms in the following centuries, the *logic* of the conservative matrix can best be scrutinised by looking at the intellectual efforts made by Catholic aristocrat royalists to justify a political, social and moral order which was no longer self-justifying through traditional sources of legitimacy. Conservatism, as noted in chapter 2, stands as a 'post-doxic' modern ideology when the previous order can no longer be taken for granted as 'doxa'.

It was not among the aristocrats who held well-established positions of power in the *Ancien Régime* that modern conservatism arose in France, but among those who were young adults at the time of the French Revolution in 1789, and who would be prominent politicians, intellectuals, and political thinkers from the Restoration of 1815 onwards. Whilst the former were assuming the absolute power of the monarch based on the dogmas of the Catholic Church and upheld by the aristocracy as given, the latter were dismayed by the destruction of this order and the construction of a new one founded on radically different principles. For more than two decades, they developed their reflections on the disastrous consequences of that political, social, and moral upheaval, as well as all the rationalisations that would serve to found a restored order, be it the previous one or an order that would accept some formal limitations on the absolute power of the monarch without weakening the fundamental unity of political sovereignty.

It is in the doctrines emerging from the writings and political actions of Chateaubriand, De Bonald, and De Maistre in the first decades of the 19th century that the profound meaning of the conservative matrix can be fully appreciated. It is the radicalisation of these doctrines by Donoso Cortès, who would die as Spanish ambassador to Paris in 1853, that exposes the absolutist essence of ‘pure’ conservatism, not diluted with constitutional liberalism, with the greatest clarity. And for devotees of the historical birth right of the origin of words, whilst it is true that the first political party to call itself ‘conservative’ was that of the English conservatives in 1834, it was in France, in 1818, that the term was first introduced in its modern political sense, with the newspaper *Le Conservateur* founded by Chateaubriand and De Bonald.

Which ideal polar star was most visible to all these thinkers from their position in the social universe? What fundamental principle for the political organisation of social life seemed more important from their point of view as cultivated aristocrats who had known, until 1789, the rationalistic challenge of the *philosophes des Lumières* only in theory, but not yet in practice? It was the disruption of a triple order that the Revolution brought with it. And it is the tension between the terror and contempt of social disorder and the aspiration to preserve or restore order that one must consider in order to capture their ideological polar star.

As a preliminary example, I will take the extraordinary testimony (posthumously published) written in the *Memoirs from Beyond the Grave* by Chateaubriand, who was more a writer, journalist, politician than a philosopher, and certainly the least reactionary of these authors. A viscount by birth, with a mother “who spent her days in church and knitted in the evenings” (1849: 228), a father who had preserved “the inflexible tradition of absolute paternal authority” (253), just before the Revolution Chateaubriand was introduced into the Order of Malta and ordained a priest (“without ever embracing an ecclesiastical career”, as he specifies). When he describes what he saw in the streets of Paris after the storming of the Bastille, he first mentions “the crowd, the people, *le peuple*, escorted by prostitutes and sans-culottes, who were already beginning to dominate”. The natural order was perverted first of all by this symbolic takeover of the streets by the people, who became more threatening, and its representation even more sordid, as it revolted on October 5, 1789. On the Champs-Élysées, “first the guns appeared on which, sitting astride, harpies, thieves, prostitutes held speeches”, then there arrived “whores, filthy drunken and coarse bacchantes, tattered ragmen, butchers with bloody aprons, other black satanassi” (249).

Social disorder, however, is as symbolic as it is material. To the astonishment of the nobility, which was “less attached to money than to privileges” (1849: 226), the National Assembly abolished the feudal system and the seigniorial rights of the first estate (the Catholic clergy) and of the second estate (the nobility). In Chateaubriand’s account of the night of 4 August 1789, “the feudal rights, the hunting rights, the privileges of the orders, the personal servitudes, the administration of justice by the lord were abolished” and, to make matters worse, “at the motion of a member of the nobility supported by other nobles” (247). Under the threatening pressure of events and the revolutionary climate of opinion, the representatives of the second estate in the National Assembly sacrificed the honours of their class in order to save themselves. It is useful to reiterate that it was not these men who gave rise to French conservatism: even if we succumb to the temptation to use the term ‘conservatism’ in its etymological sense of ‘conserving’ existing institutions, it is clearly not what they in fact did.

This blow to the social status of the nobility was too much also for those who, like De Maistre, had previously been inclined, in order to avoid the tyranny of the popular factions, to extend the powers of the parliament

and to accept a parliamentary monarchy *à l'anglaise* (Triomphe 1968). But precisely this decision of the *Assemblée Nationale*, which also included the abolition of the venality of offices, led De Maistre to affirm, with a typical ‘ideological error’ consisting in the universalisation of a person’s position and group interests, that the French Revolution would no longer have had “a single wise partisan in the universe” (1884: 88). In the eyes of de Maistre, who was a Savoyard Marquis, “the collapse of the parliamentary aristocracy was as final as that of the nobility” (1821: 135). As his biography reports, ironically, it was the reading of Burke’s *Reflections on the Revolution in France*, in 1791, that prompted him to embrace ultra-traditionalist and absolutist Catholic positions. These ideas were, of course, absent from Burke’s thinking, which combined moral traditionalism and constitutional liberalism. But one of the key messages of Burke’s critique of the French Revolution – the importance of a political system respectful of a country’s symbolic *inheritance* across generations (as in the case of English institutional history, from medieval Magna Carta to the Bill of Rights) – convinced De Maistre of the need for France to re-establish a traditional order founded upon the moral authority of the Pope.

If the symbolic demolition of the traditional social order would be achieved in 1790 with the suppression of monastic and religious orders, the sale of clergy property, the civil constitution of the clergy, and the suppression of the nobility, the traditional political order was subsequently dismantled in 1792 by abolition of the monarchy, the proclamation of the 1st Republic and the beginning of the trial of Louis XVI at the Convention. It received its fatal blow with the execution of the King in 1793.

It was in this historical context and intellectual environment that the principle of order ceased to be merely a psychosocial disposition shared in particular by those endowed with a strong anthropological pessimism, and became the object of ideological articulations concerning the inherent interconnection among the divine, moral, and human orders. Such developments can be found in Louis de Bonald’s writings on the *Natural Laws of Social Order* (1800), which state that if the general laws that govern the physical world were contradicted by the general laws that govern the social world, then “God would contradict himself” and “there would be neither material order nor social order, there would be nothing” (1800: 26). There is an eternal and necessary order that reflects the divine order and generates

a universal moral order that cannot be contested: “man rebellious to his constant laws is brought back to order by punishment” (ibid. 72).

De Bonald, who had been condemned by the revolutionary Directory for his *Theory of Political and Religious Power* (1796) – a plea for monarchical and ecclesiastical authority – would become, after co-founding *Le Conservateur* with Chateaubriand, the leader of the French ultra-royalists in the 1820s, when he was also appointed a viscount. But as a member of the Assembly, he had distinguished himself since 1816 for proposing a law banning divorce, considered a “revolutionary poison” injected in 1794 into the social body (Richard, 2017). The “Bonald law” was adopted and remained in force until 1884.

The principle of order upheld by De Bonald is profoundly anti-liberal and anti-individualist, of course. Against the liberal constitutional idea of the separation of powers, political order must be founded on the “fundamental law of the unique power” by inheritance (1796: 99), and no allegedly sovereign people had the right to depart either from “the political constitution of ‘unity of power’”, or from “the religious constitution of the unity of God” (73). But order also means adhering to the “general will of society”, which the “particular will of a few men” had no right to oppose. In opposition to Rousseau’s general will of the sovereign people, De Bonald’s general will is “conservative of society”, and is manifested by a “general conservative power” which operated in turn through a “general conservative force” (100). These, in fact, are the conditions without which “a society cannot exist or be preserved” (ibidem). In short, as an undisputed political authority governing a unified social body by means of religious morality, this was de Bonald’s conception of an order that is inseparably political, social, and moral.

The profound political-philosophical nexus between order and conservatism emerges much better from de Bonald’s words than from a reductive understanding of conservative ideology as the expression of a simple, Burkean attachment to the institutional tradition inherited from the past. Indeed, the conservative matrix rests upon a unitary and organicist conception of society that would remain predominant, in France as in England and Germany, throughout the 19th century. An explicit denial of this unitary view by the conservative camp – such as Margaret Thatcher’s memorable statement that “there is no such thing as society”, but only “individual men

and women” and families – only reflects the specificity of historical cycles in which ideological hybrids such as liberal-conservatism can flourish and the combination of multiple polar stars (such as order and individual freedom) is sought. To an archetypal conservative like De Bonald, opposing the conservative general will of society meant that “society may want to destroy itself”; and this true “social suicide is defended”, as he ironically observed, “by the partisans of natural suicide” (1796: 100), that is, by the supporters of the Revolution.

Although much less known today, De Bonald was an important ideological hub for the first French (or francophone) ultraconservatives<sup>5</sup>: in addition to his connection with Chateaubriand, he also maintained constant correspondence with Joseph de Maistre, whose most famous work is *St. Petersburg Dialogues* (1821), written after his appointment, in 1803, as Piedmont-Sardinia’s ambassador to the court of the Tsar of Russia. In these imaginary dialogues, in which de Maistre appears as the character of the Count, he gave a famous representation of ‘order’ as best embodied by the public executioner. Far from de Bonald’s taste for theological abstractions, De Maistre celebrated the figure of the *bourreau* as the most concrete expression of “this divine and terrible prerogative of sovereigns: the punishment of the guilty” (1821: 41). On the *bourreau* rests, in fact, “all greatness, all power, all subordination” (44). The following lines, above and beyond the literary suggestions of the four pages devoted to this “extraordinary being”, are also essential for understanding the logic of the conservative matrix whose polar star is order:

“He [the executioner] is the horror and the bond of human association. Remove this incomprehensible agent from the world; immediately order gives way to chaos; thrones crumble and society disappears” (De Maistre 1821: 41).

Like Hobbes’ state of nature, De Maistre’s chaos is the terrible fate of human beings who challenge a social order founded on the authority of the monarch and the “creative power” of God. Whilst for Isaiah Berlin (1990)

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5 In the early 1820s, the numbers of citations of De Chateaubriand, De Maistre, and De Bonald in French books were roughly equivalent. Over the next two centuries, however, de Bonald’s popularity declined much more than that of the other two thinkers (data source: Google Book Ngram Viewer).

De Maistre's vision anticipated the totalitarian political order founded on terror of the 20th century, the indispensable primacy of maintaining public order as a marker and metaphor of an underlying social order seems instead to be the core and pillar of a genuinely conservative ideology. This primary goal does not necessarily translate into a totalitarian, an absolutist, or even authoritarian regime. In the age of mass politics and universal suffrage, a constitutional monarchy, a presidential republic, and even a parliamentary system, can provide the institutional framework for political forces that pursue with particular intensity policies aimed at maintaining public order and, with it, the existing structure of status relations within society. The question of the regime is metapolitical – it does not directly determine the ideological content of politics. Public order, however, can and should be temporarily disrupted if the existing structure does not reflect the traditional hierarchy of status groups and classes. The very existence of an ideological school called “conservative revolution” shows that not *any* social order deserves to be maintained, but only a *certain* social order that guarantees property, status, honours, and income (especially in the form of rent, which is traditionally related to large-scale property).<sup>6</sup>

While archetypal conservatism can potentially accommodate itself with any political regime, its contingent manifestations depend on the severity of the political threat to the traditional social order. It is for this reason that, as Carl Schmitt noted in the final chapter of his *Political Theology* (1922), ideologically conservative formulations became more radical after 1848, when the threat of a proletarian revolution by revolutionary radicalism was “far more profound and consequential [...] than in the 1789 revolution of the third estate” (p. 56); therefore, “the intensity of the decision was also heightened in the political philosophy of the counter-revolution” and – concludes Schmitt – “only by recognising that trend can we understand the development from de Maistre to Donoso Cortés”, that is, “from legitimacy to dictatorship” (ibid.).

Although virtually absent from the conventional family trees of conservative thought, Donoso Cortés – a truly modern European intellectual with a

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6 The defence of this hierarchical social order may also be based upon a relationship with nature (i.e. the natural environment) aimed at imitating it rather than transforming it. It is to the conservative right that Lancelot (1985: 376) attributed the imitation of nature as one of its fundamental value orientations. Order can also be seen, in other words, as ‘natural order’.

liberal and rationalist background – brilliantly expresses the essence of the conservative ideological matrix. It is an essence, however, that has a relational component, precisely because it adapts to the nature of the historical challenge that it faces. The development of Donoso Cortés' ideas over time led him to embrace a conception of order that is, in many respects, very similar to that of de Bonald: “God established once forever the physical and moral laws which constitute order in humanity and the universe” (1851: 345), so that it is in the “confluence of the divine, the universal, and the human orders” that “the key to all secrets” is to be found (325). The potency and ubiquity of religious belief and its extension to political ideas are such that an inhabitant of Western hypermodernity is able to grasp them only by thinking about contemporary fundamentalisms and orthodoxies, whether Christian, Jewish or Muslim, and their politico-ideological attachments.

The archetypal conservative's obsession with the principle of order is reiterated throughout Donoso Cortés' *Essays on Catholicism, Liberalism and Socialism* (1851) with constant appeals to the “supreme law of order”, the “perpetual necessity of order” and for all things to “be in perfect order”. A “Catholic solution” is very clearly indicated by Donoso Cortés, “Catholicity being the absolute order” founded on the dogmas of the Church and its absolute power: on the one hand, it is “the doctrinal intolerance of the Church that has saved the world from chaos”<sup>7</sup>; on the other, “the Church alone has the right to affirm and deny”, and it has proved to be “the only oligarchy which, placed in contact with an absolute monarch, has not broken out into rebellions and seditions”. It is therefore on the Catholic Church that humanity's social and political salvation depends.

But while the main enemies of de Chateaubriand, de Bonald and de Maistre had been, in the preceding decades, the liberal bourgeois, if not some excessively liberal aristocrats, in 1848 the main political enemies were,

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7 Religious dogmas have somehow an intermediate status between a ‘doxic’ adherence to principles that appear to be given and unquestioned, and the “orthodoxy” – as Pierre Bourdieu would have called it – of the ideological appeal to the ‘right way’ of thinking: “Her [the Church’s] doctrinal intolerance has placed beyond question political, domestic, social, and religious, truths — primitive and holy truths, which are not subject to discussion, because they are the foundation of all discussions” (Donoso Cortés 1851: 42). In this sense, it can be said that the dogmas of the Church are ‘pre-ideological’, while the precepts enunciated by Donoso Cortés reflect the modern ideological attempt to restore broken dogmas.

at least in France, the socialists, those atheists and proletarians for whom “the grand remedy is in the complete destruction of social institutions” (1851: 195). This is where Donoso Cortés departed from his conservative predecessors and his own – typically ‘ideological’ – efforts to restore the legitimacy of principles that had been violently denied by recent history; as Carl Schmitt puts it (1929: 84), he thus proposed “a theory of dictatorship in place of a political philosophy of restoration”. The occasion for this intellectual shift was provided by a speech that he gave in the Spanish Congress of Deputies in 1849, which circulated under the title of *Discurso sobre la dictadura* (Speech on Dictatorship) and had a surprising resonance throughout Europe at the time.

The implications of this extraordinarily brilliant text for the definition of a consistent conservative mode of thought are remarkable. Like previous conservatives, Donoso Cortés first asserted, albeit much more emphatically, the primacy of society as an organic and orderly social body: “Society, everything for society, everything by society; society always, society in all circumstances, society at all times” (1849: 35). The immediate logical consequence of this premise is that, if social order is jeopardised, dictatorial political means become self-legitimate: “When legality is enough to save society, legality; when it is not enough, dictatorship. Gentlemen, this tremendous word (which is tremendous, although not as much as the word revolution, which is the most tremendous of all)” (ibidem). And given that Donoso Cortés had seen the revolutions of 1848 across Europe, and particularly in France, as “a final battle between atheism and Christianity, between unbelieving socialism and the remnants of a Christian-European social order” (Schmitt 1950: 84), the recourse to a dictatorship, such as that resulting from the *coup d'état* of Napoleon III, had become an absolute necessity: “in the face of radical evil the only solution is dictatorship”, as Carl Schmitt (1929: 66) paraphrased Donoso Cortés’ thought.

As a political, social, and moral conservative, however, Donoso Cortés does not attribute primacy to dictatorship as a metapolitical principle: “If I were between freedom and dictatorship, I would vote for freedom, like all of us who sit here” (1849: 55); but, he adds, “the question is to choose between the dictatorship of the insurrection and the dictatorship of the Government”, between which he undoubtedly chose the latter. If this simply reflects the essence of conservatism as the preservation of a principle

of political order, even more important is the preservation of a *particular* social order: indeed, the question that arises also concerns “choosing between the dictatorship that comes from below and the dictatorship that comes from above: I choose the one that comes from above” (ibid.). And, finally, to the “dictatorship of the dagger” he prefers the “dictatorship of the sabre” “because it is more noble”. Could this cultivated Marquis, with a consolidated position as a diplomat, descendant of the conquistador Hernando Cortés, have chosen otherwise, if not at the cost of disavowing his own family heritage, social status and even ‘personal’ identity?

### 3.4. The antiliberal matrix of order in politics and metapolitics

Dictatorship of the sabre is the post-monarchic equivalent of absolutism of the crown, insofar as they both radically reject liberal constitutionalism and the recognition not only of positive (political) but also negative (metapolitical) freedoms. Until 1848, the exercise of conservative power was in the hands of the Holy Alliance sealed with the Restoration of 1815. “The hierarchies of blood and grace”, as Polanyi (1944:9) described this process, acted so that “the kings and aristocracies of Europe formed an international of kinship; and the Roman Church provided them with a voluntary civil service”. But the traditional and naturalising self-justification based on power and grace had lost its ideological innocence with the spread throughout Europe of French revolutionary and then Napoleonic ideas, on the one hand, and the example of the 1776 United States Declaration of Independence on the other. The practice of conservative power thus became ‘modern’ because it necessitated the development of the ideological apparatus that we have examined, and because it responded to modern liberalising pressures through specifically modern political means such as press censorship and police repression by a centralised state.

In this sense, even the autocratic regime of the Russian emperor Nicholas I approached a ‘purely’ conservative form of statecraft, since it defended a traditional order that resulted from fusion among a political (Tsarist absolutism), social (landed aristocracy and peasant serfdom) and moral order (the Orthodox Church). But from the moment of his accession onwards, Nicholas’s reign was confronted with a modern form of

dissent – the Decembrist revolt (1825) – which contained evident components of the liberal matrix, both on a ‘metapolitical’ level (the search for an American-style constitution and a representative form of government) and in the more properly political sense of the affirmation of negative freedoms (these rebels were against slavery and for the abolition of serfdom). As the first act of his reign, the suppression of the Decembrist revolt was followed by the establishment of a system of repression of political dissent that relied on a secret-police department (later known as the “Third Section of His Imperial Majesty’s Own Chancellery”) and an extended network of informers and spies, as well as on censorship and control over publishing and education.

Fully consistent with Donoso Cortés’ ultraconservative logic of opting for a dictatorial solution in the face of “radical evil”, after the 1848 revolution in Paris, Nicholas I instituted an even more pervasive system of vigilance and repression that later historians would call “the Tsarist epoch of censorship Terror” (Balmuth 1960). As Isaiah Berlin (1953) noted, these measures to prevent “revolutionary disease” from infecting the Russian empire helped to create a “police state” distant from the relatively liberal institutions that some European countries had already experienced or were beginning to concede. This, as we shall see in relation to the social egalitarianism of Russian populists of the second half of the 19th century, weakened the influence of Western liberalism and pushed Russian socialist ‘ideologues’ into more radical positions. In other words, the violent tsarist response to anti-conservative thrusts created the conditions for the radicalisation of a further backlash which, contrary to the previous movement, would have popular, agrarian, and illiberal properties.

The aversion to both metapolitical and political liberalism was therefore an evident feature of those regimes that had overcome the Napoleonic menace and other threats potentially disruptive of the traditional order. If Tsarist Russia set the benchmark for extreme autocracy, conservative absolutist regimes also characterised, to varying extents, the French Bourbon monarchy, the Austrian Hapsburg Empire and the Prussian monarchy. It should not be forgotten that the conservative ideological matrix stands in opposition to – and certainly does not superimpose – the liberal matrix, and that the distinctive ideological hybrid of liberal-conservatism, which came to identify the political right for large parts of the 20th century, was

far from representing the modern conservative ideology in the typicality of its historical, philosophical and sociological roots.

However, the typicality of conservative anti-liberalism extends beyond the denial of the most elementary constitutional rights and freedoms. Except for the historically and sociologically atypical case of the United States (which had never experienced either an absolutist political system or an aristocratic social order),<sup>8</sup> conservatism, even when it was combined with relatively liberal constitutions and thus guaranteed at least limited metapolitical and political rights, as in England and other European countries after 1848, was never socially and economically liberal. In fact, it opposed an individualistic view of society and was often hostile to both free trade and the free market economy.

From the point of view of conservative ideologues, we have already observed how important an organicist and unitary conception of society was as a means to preserve a social body respectful of traditional status hierarchies. This conception is opposed to the individualistic liberal one as to a socialist conception based on class divisions. Especially when the socialist perspective began to gain prominence in European politics, the conservative practice more overtly comprised a social dimension, both as a structural response to consequences of the first wave of socially unregulated industrialisation and as a strategic move to prevent the rise of a too strong socialist movement. An early proponent of this tendency was Clemens Metternich, the chancellor and foreign minister of the Habsburg Empire, who defined himself, as early as 1847, a “*socialiste conservateur*” (conservative socialist).<sup>9</sup> What Metternich had in mind was reliance on a “social conscience” as opposed to rising individualism and a form of social paternalism that aimed to protect the community from the centrifugal effects of capitalist economic modernisation.

It is, however, the German chancellor Otto Von Bismarck who is credited with the rise of the conservative “social-insurance model”, testified as such by Esping-Andersen (1990). By promoting, especially from the 1880s onwards, compulsory state insurance for workers against accident, sickness and old age, Bismarck aimed at the same time to consolidate the

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8 The different starting conditions in the United States after Independence mark the specificity of the “American route to modern democracy”, as Barrington Moore (1966: 111) noted.

9 Cit. in Viereck 1956: 137.

stratification system of Germany society and “to tie the loyalties of the individuals directly to the monarchy or the central state authority” (24). Although this model has been sometimes labelled “Bismarckian socialism” (Taylor 2001: 149), it appears much more to be a prototype of conservative paternalism with functions of social harmony and preservation of the property structure of society, as well as a strategic move to counter the growth of the German Social Democratic Party.

A similar discourse celebrating the reconciliation of classes in the name of a principle of national unity was also typical of British conservatism in the – utterly Victorian – age of Benjamin Disraeli’s leadership, after 1868.<sup>10</sup> Far from advocating a classless society, Disraeli ushered in the paradigmatic modern conservative justification for the social order: “the real interests of classes are not inimical – they are bound together in the nation’s welfare” (Kirk: 1953); consequently, rich and poor should reunite under the superior interests of the British nation. This argument, which consists in affirming that “we are all in the same boat” would become the axiom of any authentic conservatism across time and space, in stark opposition to the Marxian principle of class conflict, but also to the liberal idea that class mobility should be encouraged by individual initiative, enterprise, competition and wealth production.

The commercial and manufacturing interests of the urban liberal middle class were, in fact, generally very poorly represented by conservative policy-makers. Disraeli himself had been a hard-line protectionist in relation to what was arguably the issue in 19th century British politics most important for defining liberal and conservative positions in the ideological space. Indeed, he strongly opposed the abolition of the Corn Laws, which were first introduced by the Tory government in 1815 in the form of tariffs, import duties and other trade restrictions on cereal grains. This typically mercantilist – that is, protectionist and anti-free trade – policy was intended to favour domestic producers, which represented the interests of rural Britain’s landowners. This severe restriction on imports, however, was disadvantageous not only for traders, but also for the poor – because it kept

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10 Elizabethan poor-relief ‘social policies’ in the late 16th century were already inspired by a “combination of charitable generosity and social discipline” (Slack 1984: 240-1) and helped to maintain social stability, that is, to prevent popular rebellion and serious public disorder. However, no ideological discourse accompanied these measures; nor could such a discourse have been disseminated in the total absence of a media-based public sphere.

bread prices high – and for manufacturers, because it reduced the disposable income of the British public (Williamson: 1990).

It is in the manufacturing urban environment of Manchester that the Anti-Corn League was formed in 1839. Among its supporters was the liberal politician James Wilson, who would found *The Economist* a few years later. The anti-Corn League's campaigns also garnered some support among industrial workers, although Chartists suspected that manufacturers ultimately aimed at reducing wages. A conservative counter-movement was formed in the rural counties to campaign in favour of the Corn Laws, so that the main cleavage appeared clear-cut: on the one side was the (conservative) social logic of landlords, rural labourers, and rent; on the other, the (liberal) one of urban manufactures, free trade, and profit.

The eventual repeal of the Corn Law, in 1846, is also very significant for its consequences in terms of ideological politics. The prime minister who made this decision during the Great Famine in Ireland was Robert Peel, a member of the Conservative Party who acted against the will of the majority of it and was supported by the Whigs. A politician with liberal leanings (he had studied the works of Adam Smith and David Ricardo), he then formed the Liberal Party in 1859, together with the 'Peelites' of his former party (who included the future liberal PM William Gladstone), after merging with the Whigs and the Radicals. This is one of the innumerable cases in the history of modern politics in which the obstinate search for one polar star rather than another has been followed by an adequate clarification in terms of party politics, with the rise of new parties or the inter-party mobility of individuals, parliamentary groups and, subsequently, voters.

British economics would be dominated by 'free trade consensus' during the following decades, but the issue became divisive again at the turn of the century. In 1903, the Tariff Reform League was formed as a radical conservative and protectionist pressure group to impose taxes on imports and protect British industry from foreign competition, which was seen as 'unfair'. The principle of "imperial preference" and the slogan "Tariff reform means work for all" were advocated by Joseph Chamberlain, the 'imperialist' Secretary of State for the Colonies, and backed by the grassroots of the Conservative Party, whereas the existing policy of free trade with no tariffs was fully supported by the Liberal Party. As happens today, free trade was held responsible by anti-liberals for the crisis in several sectors of British

industry, including iron, wool, and cotton (while sugar and silk were already “gone”, as Chamberlain put it). With the Liberal Party’s large victory in the 1906 elections, however, the demand for protectionist interventions was then marginalised until the First World War.

Although economic protectionism is not a constitutive element of the conservative matrix, it can be considered a ‘derivative’ one, that is, a historical and logical consequence of an economically and socially anti-individualistic stance, as well as of the defence of consolidated status and ownership positions. The logic of the defence of private oligarchies, both in land ownership and in industry, is a development of an ideological position which is other, in this respect, than the liberal Holy Grail of competition and the socialist ideal-type of collective ownership of the means of production. But in the field of international economics, and within the framework of a capitalist system based on mixed economies, the antinomy between free trade and protectionism would remain essentially a matter of liberals versus (radical) conservatives: the liberal international free trade agreements of the 1990s and 2000s, in the heydays of economic globalisation, and the ‘centripetal’ counter-movements of the 2010s would testify it a century later.

Similarly, nationalism as a political discourse of a national élite, rather than as a metapolitical grievance of a dominated people, can be seen mainly as a historical and logical derivation of the ideological conservative matrix in the era of mass politics. After 1848, the progressive affirmation of liberal constitutions based on the principle of representative government and the gradual granting of political rights to increasing numbers of enfranchised citizens generated a true dilemma for conservatives: how could these parties succeed in preserving their social interests and political influence while participating in mass politics?

### **3.5. The conservative matrix in mass politics: integrating the nation and closure to out-groups**

From the perspective of historical political science, national differences in the development of conservative parties depend primarily on the extent to which they already had a strong organisation (as in Britain, Belgium and the Netherlands) at the time of mass democratisation, rather than being

essentially parliamentary parties (as in France, Prussia, Spain and Italy).<sup>11</sup> But whatever the timing and extent of their electoral affirmation, both nationalist and religious appeals proved to be ‘natural’ means to move beyond their core upper-class constituency: for instance, “Queen, God, and Empire” was the motto of the British Conservative Party, while “God, the Netherlands, and the House of Orange” was that of the Dutch conservative (“Anti-Revolutionary”) Party.<sup>12</sup>

In many European countries, both Catholic and Protestant, the ongoing efforts of central states to assert their power – along Rokkan’s (1999) *State vs. Church* cleavage – at the expense of the traditional religious institutions made conservative parties the local defenders of the latter. Not only has religiosity been a historical hallmark of conservative parties since the dawn of democratisation, but also the ideological basis of this tendency has been more directly inscribed in the essence of the conservative matrix, with its original appeal for the preservation of a moral order based on the tradition and dogmas of the Church. While not all conservative parties are religious, the reverse is generally the case: all religious parties have a conservative component, at least as regards the sphere of moral order.

As for nationalism, the link with conservatism is certainly more complex, because many nationalist movements in the mid-19th century – from the Italian *Risorgimento* to Prussian Pan-Germanism – were driven by the ‘romantic’ goal of creating a nation state that guaranteed the self-determination of the national people, not to mention the movements struggling for national independence from the Ottoman or the Austrian empires (like the Italians in the north-east regions). Thus, it is certainly true that nationalist movements around 1848 – as primarily metapolitical struggles about ‘who should rule whom’ – tended to converge more easily with liberal and republican political ideologies and metapolitical institutional projects. However,

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11 As Ziblatt (2017: 46) reports, “in France until 1876 nobles controlled local prefectures, and thus political parties of the right lagged organizationally”.

12 As Gramsci (1932-35, notebook 10: §12, my translation) noted, in the second half of the 19th century the “hegemonic principle”, “the real ethical-political link between rulers and governed [...] was the concept of fatherland and nation. The popular ‘religion’ substituted for Catholicism (or rather combined with it) was that of ‘patriotism’ and nationalism”. Hence, “the new meaning assumed by the term ‘patriot’ [...] became a monopoly of the nationalists and of the right in general”, those political forces by which “the exaltation of patriotic sentiment was organized” as a new ‘religion’ for the masses.

once a nation-state had been established, it can be inferred that modern nationalism as advocated by the dominant national groups, was historically a derivation of conservative parties and elites facing the extension of suffrage. Indeed, nationalism is also a somewhat 'logical' and ideological derivation of a conservative matrix which, contrary to both cosmopolitan and pro-free trade liberalism and to internationalist socialism, could more 'naturally' incorporate the nationalist appeal into its order-seeking organicist view of society.

In Germany, where universal male suffrage was introduced as early as 1871, the two main conservative parties, the German Conservative Party (DKP) and the German Empire Party (*Reichspartei*), were aggressively nationalist, also given the national mobilisation that the recent Prussian war against France (1870-71) had demanded and the German unification which Bismarck had achieved under Prussian leadership in 1871. And it is the predominantly Prussian roots of the German Empire that explain the strength of the conservative-nationalist fusion of the following decades: on the one hand, the old Junkers, the parochial and conservative landowners of Eastern Prussia, still exercised disproportionate influence on Parliament (Weber 1918); on the other hand, Bismarck himself sought to integrate the population of the German empire through the construction of a traditionalist Protestant German identity, and only at a later stage by implementing, as already noted, socially paternalistic policies. An interesting ideological challenge to the primacy of a national conservatism reminiscent of Prussian authoritarianism would appear only after the First World War, with the 'conservative revolution' of 1918 (see next section).

In the French Third Republic after 1870, while traditional conservatism was still monopolised by the monarchists (Orleanists and, even more so, pro-Bourbon Legitimists), Bonapartists represented the main 'pro-order' parliamentary alternative.<sup>13</sup> In opposition to the republican, radical, and

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13 These are the three archetypal expressions of the political right in France ("Les trois droites") according to the influential classification of Rémond (1982): counter-revolutionary legitimists, liberal *Orleanists*, and Caesarist Bonapartists. In an ideological matrix-approach, while the Orleanists reflect a conservatism hybridised with metapolitical and economic liberalism, the Bonapartists correspond to a metapolitically populist/authoritarian ideological orientation that only partially reflects a national-conservative political ideology. Their emphasis on charismatic leadership may also be seen a post-monarchical reconfiguration of the matrix of order in the context of mass politics.

socialist (lower-class) threats to political, social, and moral order, they embodied a populist-authoritarian meta-political idea of the state based on a plebiscitary relationship between the leader (following the memory, still vivid, of Emperor Napoleon III) and the people. Since the political content of their ideology was quite diversified and contradictory – it included relatively progressive social reforms – but their social base was essentially upper class (Passmore 2013), what mattered most for their ideological definition was support for an imperialist, authoritarian, centralised, militarist solution to the problem of post-monarchical order. As claimed by Donoso Cortés in his *Discurso sobre la Dictadura*, Louis Bonaparte's 1951 *coup d'état* to end the Republican parenthesis was precisely the dictatorial response seen as necessary by those conservatives who understood that the times were not favourable for the immediate monarchical restoration.

In the 1880s, a more modern form of conservatism found its clearest expression in the *Conservatisme* resulting from an evolution of the “*Union des droites*” (the royalist party joining Legitimists and Orleanists), to which the meeting between the new Orleanists and the politically less progressive Bonapartists gave decisive impetus. Fully aware of the reality of mass suffrage, this political movement avoided claiming a ‘throne and altar’ type of dynastic monarchism. It focused instead on attacking republican degeneration and secularisation of education, while favouring economic protectionism. But after an ephemeral electoral success, in 1886 *Conservatisme* was already in a political dead end, also given the revocation of support from the monarchists, who disliked its gradual acceptance of the republican and democratic order.

It is in this phase of political turmoil and ideological confusion exacerbated by a decade-long economic slowdown that a major movement – Boulangism – emerged in the form of popular support for the political leadership of Georges Boulanger, a general who was initially appointed Minister of War and then became an extremely popular politician in the late 1880s. Profoundly nationalist, anti-bourgeois and anti-socialist, Boulangism gained the support of monarchists, conservatives, and many Bonapartists, but it also attracted members of the lower-middle classes – particularly artisans and shopkeepers affected by economic modernisation – and more popular strata. Hence, Boulangism determined a profound transformation of the traditional conservative Right, the royalist involvement with

Boulangism being part of a “desperate strategy of elitist conservatives to confront mass society and political democracy” (Irvine 1988: 16). Given Boulangism’s peculiar social alliance of the traditional upper classes, the petty bourgeoisie and the popular masses in the context of advanced mass politics, and also given its radical and non-elitist conservative nationalist ideology, it was an important precursor of the modern radical right; and it is seen by some historians – most notably Sternhell (1983) – as one of the main ingredients of the future fascist recipe.

The emergence of new political issues such as mass immigration and citizenship laws, as well as contingent events such as the Dreyfus affair, greatly contributed to redefining the ideological space in France in the last two decades of the 20th century; and it did so along modern lines that still operate in contemporary politics. A wave of xenophobia arose in reaction to mass immigration, especially from other Southern European countries, with even a leftist intellectual like the young Maurice Barrès repositioning himself in a newly-created combination of radical left and right by publishing a pamphlet entitled “Study for the protection of French workers: against foreigners” (1883), before moving towards Boulangism and the emerging radical right in the following decades. The question of legal national citizenship also became increasingly entangled not only with ethnocultural, but also with more recent bio-racial considerations. In the 1890s, the Dreyfus affair closed the ranks of the national conservative right: against the Jewish captain were the monarchist conservative Right, the aristocracy, the nationalists, the army, the clergy, and part of the wealthy bourgeoisie (Suvanto 1997: 95). A more organised expression of this ultraconservative and nationalist reaction to Dreyfus’ public defence by liberal-progressive intellectuals was *Action Française* which, founded in 1899, would maintain royalist, nationalist, anti-parliamentary and catholic traditionalist positions until 1944, when it was finally dissolved because its main leader, Charles Maurras, had supported the Vichy Regime. The left, Jews, immigrants, virtually all religious and ethnic out-groups would henceforth always be the enemies of a certain party of radical order in Western politics (see also Ignazi 2003).

All the main components of the matrix of order were therefore defined by the end of the 19th century. While I have found it necessary to reconstruct the origins of this ideological matrix from the 17th century and thus show its close dependence on the conservative tradition, it is secondary

to call it ‘conservative’ or use some other adjective. The composition of this matrix leaves room for some internal variation. Originally, the polar star of order translated into the political goal of establishing a unitarian principle of authority, the choice of which was effectively implemented and respected. The affirmation of political order therefore requires a sovereign decision, one that cannot be revoked by other centres of power and is, therefore, “*superiorem non recognoscens*”. Because establishing a certain political order means ensuring protection to the subject population (*protego, ergo oblige*), this aim does not necessarily require authoritarian or dictatorial solutions. As we have seen, even a constitutional monarchy or a republic can guarantee, and even enforce, if necessary, public order to the extent that sovereignty, as the power to decide the state of exception, remains the prerogative of the monarch, or the president, or the chancellor. If the latter regimes are attenuated versions of the principle of authority, they are perfectly acceptable to the party of order insofar as they are functional to the maintenance of a particular social order. When this is dangerously threatened or disrupted by revolutions or profound societal reforms, any kind of political order, even dictatorial, becomes acceptable for the purposes of its preservation or restoration. Therefore, while conservatives are not necessarily authoritarian, it is within the conservative matrix of order that the deep roots of authoritarianism are to be found.

This second specification of the polar star of order as ‘social order’ finds its historical origin in the defence of social status positions associated primarily with aristocratic honours and landed ownership; in any case, it is the principle of property that is specifically protected. This opens the way for diverse historical expressions of the type of social order that the party of order aims to defend. From an elite minority, British Tories became ‘cross-class’ in the last decades of the 19th century: because suffrage expansion required an extension of the social bases of electoral support, a new non-elite group, namely shopkeepers and artisans, became the ideal type of conservative middle-class voters. Indeed, they had small commercial properties to defend, while liberal bourgeois typically sold their services (with lawyers as a paradigmatic example) and socialist/progressive industrial workers sold their manual labour. But the social coalition of the aristocracy and the petty bourgeoisie would not be sufficient for the party of order to maintain this type of social order based on property. The political function of nationalist

and religious appeals, as well as appeals to any sort of traditional moral order, was precisely to ensure the loyalty of broad strata of voters – with no specific social interest in the preservation of that particular *status quo*, such as blue-collar and, in part, agricultural workers – to parties that advocated a conservative ideology.

### 3.6. On the non-inertial nature of conservatism: the German ‘Conservative Revolution’

In a politically premodern environment, the spontaneous and ‘doxic’ adherence of the people to a social order based on inherited, innate noble property did not require an ideological justification in the modern sense of the expression; it relied on a kind of naturalist ‘ideology’ – though we should instead call it a ‘naturalist’ vision of the social world – that tends, like all ideologies in the Marxian sense, to naturalise a privilege, to provide an implicit social theodicy, or ‘sociodicy’, which makes social order acceptable as such, without the need to theorise about it. As Bourdieu puts it, “you are on the side of nature, of natural gift, of what is naturally transmissible” (2015: 267) and nobility thus provides “the model for all ideologies”.<sup>14</sup> But what Bourdieu extends to all ideologies – innatism, naturalisation of privilege – should instead be seen as a property of conservative ideology in particular. It is ironic that the author who best saw and described the conceptual dividing line between ‘doxa’ and ‘orthodoxia’ failed to distinguish between ideology as a misrecognition nurtured (but not politically orchestrated) by the dominant classes and ideology as active mobilisation and discursive justification of a particular social order.

Indeed, if “all ideologies” were a form of “naturalisation of a privilege”, there would be no appreciable difference between the different ideological matrices of modernity, which in turn would not differ from premodern cultural patterns for interpreting the social world on behalf of the dominant strata. But this would be a very limited understanding of the notion of ideology, the usefulness of which is evident in the historical context of political modernity, when no natural order could any longer be considered

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14 Elsewhere, Bourdieu (2000: 78) indicates “universalisation” rather than “naturalisation” as “the sociodicy par excellence”.

as given and unquestioned. To save a certain (conservative) social order, broader anthropological, religious, nationalist, or ethnocultural reasons had to be enunciated by the ideologues and invoked aloud by the interests that they were serving.<sup>15</sup> And if this reflects the genesis of the modern conservative ideological matrix, the same universalising logic applies to any other modern political ideology, which always articulates a discursive ‘package’ and a symbolic system that comprises a worldview, an ultimate goal, and some sense of collective identity.

In order to avoid the temptation to use the term ‘conservative’ in the reductive sense of ‘inertial’ and ‘in favour of the existing state of affairs’, it is useful to bear in mind the idea of a ‘conservative revolution’, which identifies a political-cultural movement that animated the German ideological field between the end of the First World War and the beginning of National Socialism. Despite its heterogeneity, this movement shows with remarkable clarity that conservatism does not necessarily mean preserving the existing social and political institutions or restoring the ‘good old ones’; and that having the principle of order as the main ideological polar star does not necessarily imply being reasonably moderate and counter-revolutionary, *à la* Edmund Burke. While the German revolutionary conservatives abhorred the weak and rationalist democratic parliamentary ‘order’ of the Weimar Republic, they were not literally ‘reactionary’, that is, in favour of the restoration of imperial rule under the Kaiser’s leadership. Yet the philosophical foundations of their political conception were still inscribed in the reaction to the historical shock caused by the French revolution, with its roots in the modern Enlightenment and its legacy in recent liberal-democratic institutions.

Profoundly influenced by Friedrich Nietzsche’s thought, the leading thinkers of the conservative revolution rejected a linear understanding of human progress and perfectibility through science, technology, pedagogy, and social engineering, but also the similarly linear Christian teleological perspective. To an evolutionary philosophy of history, they opposed a cyclical view very much indebted to the Nietzschean idea of the “eternal

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15 Ideologues also serve themselves, as Bourdieu points out, while serving the interests of the broader strata to which they belong. If the latter is the classic Marxian function of ideologies, the originality of Bourdieu’s analysis consists in focusing, in line with its field theory, on the specific ‘positional’ interests and social dispositions of those who produce ideologies, as well as on the relational logic of the field of ideological production.

return”, the circular and eternal repetition of all things. Hence, these conservatives thought that they were “on the side of eternity”, of a life that is always valid (Mohler 1950), and of a reality that should not be denied – as the idealists, according to Nietzsche’s invective in *Ecce Homo*, do when they do not like it<sup>16</sup> – but should be heroically accepted as constitutive of life. And these conservatives, who believed in the eternal nature of humanity and the world as it has always been and will be, were at the same time revolutionaries because they rejected the mediocrity represented by modern bureaucratic and parliamentary restrictions on political imagery, and they valued war – politics as “spiritual warfare” was, again, in Nietzsche (1888: 90) – and even the possibility of civil war as the most intense degree of politics.

While this new expression of the conservative matrix generally rejected the religious element and, more particularly, the Christian message, its nationalism was as vibrant as it was self-critical in regard to the defects of the German character and its historical deficiencies. In a Germany filled with resentment over the conditions, perceived as humiliating, imposed by the Treaty of Versailles and very hard-to-repay war debts, this movement foreshadowed a German recovery in the international order from which it had been marginalized. But this recovery was only possible if Germany got rid of its main enemy. Rather than socialism, the enemy with which all these conservative revolutionaries were obsessed was bourgeois liberalism (Breuer 1995). Indeed, not only was this philosophy a pure expression of individualistic modernity and of a liberal-democratic system that could develop relatively quickly and safely in Britain, given its geo-political insularity, but it also did not fit the unitary and organic spirit of the German nation. Furthermore, the German liberal elites were also held responsible for accepting and accompanying the country’s decline dictated by the dominant nations.

This fierce anti-liberalism is also visible in the writings of the less radical among these revolutionary conservatives, such as Thomas Mann, whose *Reflections of a Non-Political Man* (1918) praised the French civilisation for being inherently political – with its “hypocritical” refrains of human rights, freedom, equality, cosmopolitanism and generalised brotherhood; in

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16 Nietzsche here opposed the ‘truthfulness’ of the struggle between good and evil to “the cowardice of the ‘idealist’ who takes flight in the face of reality” (1888: 92).

contrast, German *Kultur* was portrayed, as in Oswald Spengler's *The Decline of the West* (1918), as based on a spiritual and moral *Gemeinschaft*, a sense of organic community in the meaning that Ferdinand Tönnies had first theorised in a more sociological sense. Together with Ernst Jünger, Spengler embodied a more radical form of conservatism which found its most authentically political expression in Carl Schmitt, the rediscoverer of Donoso Cortés's idea of a necessary dictatorship, the jurist always ready to recommend the clear political "decision" and the legitimate suspension of legality when a parliamentary democracy based on the rule of law proves too weak, as it is bound to do, to protect its community. And even Martin Heidegger, who famously adhered to National Socialism in 1933, would later be associated with the conservative revolution, particularly as regards his critique of the 'rootlessness' of urban and bourgeois modernity, to which he opposed the model of an archaic and rural sense of earth and roots.<sup>17</sup>

Whether the German recovery was to draw inspiration from the *Völkisch* origins of the Germanic populations, from the Pan-Germanist tradition of the Holy Roman Empire, or from the traditional model of Frederick's Prussia, the current order had to be destroyed in order to build a new one in which past, present and future could be combined together. It has often been observed that the conservative revolution was the cultural humus from which Nazism grew, and it is no coincidence that Hitler in 1936 called himself "the most conservative revolutionary in the world".<sup>18</sup> However, the connection between these two movements is only part of the history of the ideological genesis of National Socialism, which was also indebted to fascism, socialism (in the form of German social-revolutionary nationalism, sometimes improperly called "National-Bolshevism") and – on a metapolitical level – totalitarianism.

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17 The system of ideological oppositions that characterised Heidegger's philosophical habitus is brilliantly described by Pierre Bourdieu (1988: 49-59).

18 This self-definition appears in the entry of *Historisches Wörterbuch der Philosophie* online on "Revolution, konservative" by Ralf Konersmann. It is also reported in a footnote of Theodor Adorno's *Ontology and Dialectics* (1960/61). Adorno himself described National Socialism as "both pseudo-revolutionary and pseudo-conservative" in a lecture delivered in 1959.



## Chapter 4

# The distinctive liberal matrix in metapolitics, politics and economics

### 4.1. The prepolitical genesis of the liberal matrix

Contrary to conservatism, the difficulty with liberalism is not so much grasping its authentic philosophical meaning as recognising it as a distinct ideology. Of course, the semantic ambiguity of liberalism is undeniable when comparing its general connotations in Europe and the United States, where ‘liberal’ has become essentially a synonym for ‘left’. But even in the North-American context, the European understanding of the concept quickly re-emerges as soon as the specifications ‘classical liberalism’ or ‘economic liberalism’ are added. What remains difficult, however, is perceiving liberalism as a ‘third’, distinct ideological stance in a political space that was almost monopolised throughout the 20th century by the left/right dichotomy, and to do so without simply reducing it to its ‘centre’.

There are several reasons for the dichotomisation of Western politics that has erased liberal specificity. The most notable of them are the conflation of liberalism with liberal constitutionalism and the principle of representative government; a relative rapprochement between liberal and conservative parties in European politics since the emergence of the socialist challenge in the mid-19th century; the absorption of liberalism in the form of compliance to liberal representative democracy by all parties opposing the illiberal model embodied by the Soviet Union during the Cold War; a certain adhesion to politically and economically liberal principles by socialist mainstream political forces after 1989; and the difficulty of ‘selling’ a convincing form of ‘mass liberalism’ in contemporary electoral markets.

One thesis of this book, however, is that the Western ideological field of the 21st century can best be understood by adopting an ideological matrix-approach that fully recognises the distinctiveness of liberalism as a third ideology besides conservatism and socialism/progressivism. A certain

polarisation over cultural and societal issues relating to immigration, gender, and sexuality at the level of public opinion and party politics; the rise of authoritarian tendencies by political leaders in formerly democratic or democratising regimes (such as in Hungary, Poland, Russia, and Turkey); and the re-emergence of partisan conflict around the acceptable extents and limits to be enforced on economic and financial globalisation, protectionism, free trade, taxation of revenues, and public spending: essential for understanding all these trends requires consideration of the original matrices of European politics (and beyond) that have developed over the centuries.

Ironically, contemporary politics is more intelligible when one uses – with all the necessary caveats and conceptual adaptations – a scheme based on the 19th-century ideological space, one also inclusive of liberalism, rather than the twentieth-century left/right schema. Far from advocating a form of epistemological archaism unable to handle new political issues, an approach that values the ideological specificity of liberalism may also prove more helpful for understanding the ideological roots of contemporary policy positions on issues such as shopping-mall opening hours and days; regulation, licencing and protection of food delivery workers, Amazon workers, taxi drivers and ride service companies; state and urban policies on mass tourism, low-cost flight companies and online vacation rental companies; regulation and taxation of online commerce platforms, social media companies and social networking sites; enactment of public video surveillance and other digital surveillance systems; and many other issues related to contemporary digital societies. In many cases, in fact, a liberal position on these issues will coincide neither with a conservative nor with a socialist/progressive one, because the three respond and correspond to different ideological ‘polar stars’ that pursue different political logics and social interests anchored in the history of modern politics.

But there is a further, perhaps even more important, advantage of conceptually isolating liberalism as a ‘third’ political ideology: the clarification of the other two main political ideologies that this approach makes possible. Once ‘purged’ of the component deriving from the liberal matrix – a component that can be more or less well rooted or easily removable – the conservative and socialist/progressive matrices clearly evidence their fundamental logics. And if, in their most usual expressions, conservative and

egalitarian positions show some degree of hybridisation with metapolitical, political or economic liberalism, it is important for analytical purposes to understand what their ‘pure’ ideal types are and to recognise, on the contrary, liberal-conservative and liberal-progressive hybridisations. Indeed, reducing conceptual confusion is a first benefit that the social sciences can bring to politics.

In the same way that we found the prepolitical foundations of the conservative matrix in Thomas Hobbes’ fear of the chaotic state of nature and his anthropologically pessimistic assumption that “Man is a wolf to man”, it is undoubtedly to John Locke that we should look in order to capture a defining disposition of liberalism towards the social world. Following the method of these chapters, we now analyse the original texts of the ideologues in order to both test and further specify the theoretical framework based on an ideological-matrix approach. In the second of his *Two Treatises of Government*, published in 1688, Locke did not address issues radically dissimilar to those of Hobbes’ *Leviathan*, written a few decades earlier. In fact, four key points are common to both works: (1) to avoid a state of war, (2) political government is needed, (3) which cannot, however, be based on divine right, but rather (4) on a contract among men who leave the state of nature and enter civil society. Central, therefore, for both Locke and Hobbes, is the problem of a legitimate political power entitled to punish those who violate the norms of peaceful coexistence. However, not only are their political solutions very different as regards the limits of sovereign power, but a deep chasm divides their prepolitical beliefs about the ‘ontological’ state of the world (that is, about the state of nature and human nature).

While the identification of John Locke as the philosophical father of liberalism is far from new, it is important to investigate his texts through the more specific lens of an ideological-matrix approach. For Locke, whose philosophical point of view fully reflects the rise of Western modernity, “we are born free, as we are born rational” (§61); men are “by nature all free, equal, and independent” (§95) and the law of nature [is] that of “reason and common equity” (§8). It is this natural law of reason that “teaches all mankind [...] no one ought to harm another in his life, health, liberty, or possessions” (§6). This optimistic anthropology is not naïve, like that of the judicious theologian who prescribes charity and derives the obligation

to mutual love from an “equality of men by nature” seen as too self-evident and unquestioned.<sup>1</sup>

The natural state of liberty, for Locke, should not become a “state of licence” (§6), and the enjoyment of natural rights is constantly exposed to “the invasion of others” (§123); hence, the ends of political society and government consist precisely in guaranteeing the exercise of these rights. But while Hobbes stresses, over and over again, the ‘reality’ of every man’s war against every man, Locke’s deep and most often reiterated belief is the natural right of men to freely dispose of their life and possessions. And when he describes a social nightmare, it is that of being “subject to the inconstant, uncertain, unknown, arbitrary will of another man” (§22), as is the condition of slavery, which radically denies the natural right to “freedom from absolute, arbitrary power” (§23).

It is the connection of these two words – ‘rights’ and ‘freedom’ – which must be seen as constitutive of the liberal ideological matrix. The right to freedom, or freedom as a right is, therefore, the ‘polar star’ of modern liberalism. This freedom, in Locke, is still essentially a ‘negative’ freedom, because it coincides with the right not to be harmed, enslaved, or dispossessed by the arbitrary power of another man or by a despotic form of government. However, it contains the seeds of the affirmation of any right to freedom in the ‘positive’ terms of individual emancipation and self-determination by means of a continuous updating of the social contract. Whilst life, in Hobbes’ contribution to the foundations of the conservative matrix, is the result of the protection by the state in exchange for obedience (*protego ergo oblige*), in Locke, life is a right to be claimed: this is how all rights of positive freedom would be interpreted by liberals in the following centuries.

While it is quite clear that Locke should be considered a major precursor of liberalism, some elements – namely, the ideas of ‘equality’ and ‘property’ – may create some confusion over his symbolic links with both progressive and conservative matrices. In relation to the former, however, when Locke states that all men are born free and equal, the equality that he has in mind consists, once again, in that natural right which will provide a philosophical basis for the future judicial principle that all men are formally “equal before

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1 Locke refers here to Richard Hooker, an influential 16th-century English priest and theologian.

the law”, and certainly not socioeconomic equality, which we identify as the socialist/progressive polar star.

As regards the potential overlaps with conservatism, it is true that Locke also places much emphasis on ‘property’, to the point that the preservation of men’s property is referred to in one passage as “the great and chief end of men [...] putting themselves under government” (§124). And, of course, this was also part of the conservative matrix’s ultimate goal of preserving social order, also meant as a property order. But while the conservative justification for property is the social sacrality of the principle of ‘inheritance’, Locke provides a very different framing for the right to own property, which should be based on “labour”. In fact, no one, not even God, has ever said that the world “should always remain common and uncultivated” (§34); on the contrary, the “appropriation of any parcel of land” (§33) is justified if it is done by “the industrious and rational” (§34) through their labour; yet, for any man it would be “useless, as well as dishonest, to carve himself too much, or take more than he needed” (§51).

Therefore, in addition to foreshadowing the future aversion, at least in principle, of economic liberalism for – philosophically more conservative – monopolies and hyper-concentrated business ownerships, in these passages on property and its moral justification Locke anticipates the liberal *problématique* of merit as grounded in individual effort, entrepreneurship, and ability. And if the idea of ‘meritocracy’ is nowadays liable to be accused of conservatism, it is because the effects of the virtuous interaction of inheritance and ‘effort’ are not always sufficiently well disclosed. In other words, to the same extent that property can be framed in conservative or liberal terms, so can the liberal slogan of merit be seen as having a somewhat concealed conservative component, which refers to the unequal probabilities that individual effort is rewarded by success depending on the socially ‘inherited’ educational and economic conditions of departure. Also for this reason, the discourse of meritocracy provides an exemplary derivative element of the contemporary liberal-conservative hybrid ideology.

There is certainly more than a grain of truth in Friedrich Nietzsche’s assertion concerning the “Anglomania of modern ideas”, that is, their mainly English origin. While liberal ideas were considered, a century after the Enlightenment and the French revolution, as “French ideas”, Nietzsche accused the English of having caused “a total depression of the European

spirit” with the “vulgarity” and “plebeism” of the modern ideas they originated, with the French being only “their best soldiers, and likewise, alas! their first and profoundest victims” (1886: 86). And it is no coincidence that Joseph De Maistre, in his *St. Petersburg Dialogues*, had the English liberal John Locke, but also the later French liberal Voltaire, as his main intellectual targets.

But it was Locke who laid “the foundations of a philosophy that is as false as it is dangerous”, and “these terrible germs, animated in the hot mud of Paris, produced the revolutionary monster which devoured Europe” (De Maistre 1821: 524). From a conservative point of view, Locke’s main fault was his empiricist endeavour to contradict conventional wisdom, to deny common sense, to humiliate authority. And this “negative philosophy”, which “denies everything”, “shakes everything”, and “protests against everything”, was seen as “the disease of the 18th century”, which was in turn “the son of the 16th” (526-7).<sup>2</sup> Hence, the logical and historical roots of liberalism as a critique of established authority and its regime of truth go back, on the one hand, to the Protestant Reformation (for its philosophical individualism and the challenge addressed to the Roman Catholic Church); and on the other, to the rise of the experimental scientific method (in which the English philosopher and ‘liberal-minded’ member of parliament Francis Bacon had a prominent role).

When looking at the long historical process that engendered what we call the ‘modern liberal ideological matrix’, one should consider, rather than the question of temporal primacy, the complex pattern of reciprocal and recursive influences between the English and French philosophical and institutional experiences. If we consider liberalism as a constitutional project, and thus as a ‘metapolitical’ ideology, it is clear that the premises of the principle that would later be known as the ‘separation of powers’ were best developed by Montesquieu in his *The Spirit of the Laws* (1748), with its emphasis on the importance of having clearly defined and balanced powers so that none of these become overwhelming and despotic. As is well-known, this theory strongly influenced the founding fathers of the American constitution, who came to base the idea of representative government on a weighted balance of powers at different levels – state vs. federal government, Congress

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2 “If he had lived long enough to see the consequences that were drawn from his principles” – concluded De Maistre in relation to Locke’s intellectual and political heritage – “he himself would have torn out the guilty pages with indignation”. (1822: 529).

vs. President, electors vs. popular vote, etcetera. But while James Madison explicitly relied on Montesquieu's arguments in a famous Federalist Paper (Federalist No. 47, 1788), John Locke's political philosophical influence was generally even stronger on the American founders, given the motherland's cultural ascendancy over the former British colonies of America.

Moreover, nothing more clearly shows the idea of 'recursive' influence than the fact that Montesquieu himself had manifestly drawn inspiration in his work from the historical case of England, to which he devoted four chapters, as the first example of a quasi-parliamentary political system based on the rule of law. And if in the United States neither the conservative nor the socialist ideological matrix have ever developed at a mass level in their 'pure' types, it has also been because of the meta-politically liberal historical imprint of its political-institutional culture. Liberal constitutionalism, in other words, would always tend to permeate mainstream party politics in the ideological landscape of the United States.

Beyond this relationship of continuous reciprocal influence, there are two areas – religion and economics – in which we should distinguish a 'French touch' and a 'British touch' at the origins of the liberal matrix.

The principles of religious freedom and tolerance were, in a Europe still exposed to the possibility of new bloody religious wars and civil wars, clearly supported by John Locke, the author of *A Letter Concerning Toleration* (1689), but also by Baruch Spinoza, who had in fact indirectly inspired Locke's thought during the years that he spent in Amsterdam. Obviously, opposition to all forms of abuse or oppression of individual freedom, including those resting on religious dogmas and authority, is inherent in the liberal matrix. Like the principle of separation of Church and State, advanced by both Spinoza and Locke, all these elements have proven compatible throughout history with the rise of Catholic and Protestant liberal tendencies and parties in southern and northern Europe respectively.

However, the liberal matrix has also incorporated the possibility of a cultural and philosophical French variant, most notably in the figure of Voltaire, who was at the same time radically anticlerical and hostile to all revealed religions. From an initial 'Anglomaniac' position – he spent a few years in England, of which he appreciated the political system, just like the political-philosophical thought of John Locke – Voltaire arrived at an attitude of ostentatious contempt for Christian "superstitions" and fanatical

beliefs. His mocking satire of religion – evident above all in his plays and private correspondence, where he often inveighed against the usurpation of popular credulity exercised by the Bible, the clergy, as well as the “false prophet” Mohammed – was accompanied by a fierce struggle against the religious intolerance which could, in turn, take on radical tones.

It is, for instance, with the motto “*Écraser l’infâme*” (Crush the infamous) – by which he attacked religious intolerance and the physical consequences to which religious ‘outgroups’ were still exposed in 18th century France – that he accompanied for some time the signature of his letters. In 1767 he wrote to Frederick II, the “Great” Prussian king with whom he had close relations for a few years: “As long as there are rascals and fools, there will be religions. Ours is without a doubt the most ridiculous, the most absurd, and the most bloodthirsty that has ever infected the world” (1767). In another letter he defined Christianity as “the most infamous superstition that has ever brutalised men and desolated the earth” (1763). If Voltaire was not a self-proclaimed atheist – as were other *Encyclopédistes* such as Diderot and, much more radically, d’Holbach – his cultural attitude towards religions and religiosity marked a fundamental shift from a position that affirms respect for all religious and non-religious practices to one that proclaims the disrespect of all established religions.

This shift is not a surprising outcome in the utterly ‘modern’ enterprise of applying critical reason to the analysis of traditional beliefs, which often come to be defined as received ideas, prejudices, and symbols of obscurantism. However, not only is this shift not the sole possible outcome, it is also not without consequences for the future development and interpretations of the liberal ideological matrix. Indeed, from the ‘French touch’ of Voltaire’s actively anti-clerical and anti-religious contribution to liberalism has stemmed an entire galaxy of political-ideological tendencies ranging from French revolutionaries (who celebrated the “cult of reason” in the years 1793-4), to the French 19th century and the Italian 20th century radicals, to anarchists and other libertarians. In an even broader sense, the different imprints of the British and French liberal matrices in their respective cultural and political attitudes towards religiosity are still visible, as demonstrated by the global debate on the “right to blasphemy”, also defended by President Macron, that arose after the 2015 and 2020 Islamist terrorist attacks on the French satirical magazine *Charlie Hebdo*.

## 4.2. Economic extensions of the liberal polar star

If what I have called a ‘French touch’ would tend to inform – by replacing agnostic ‘laïcité’ with militant ‘laicism’ – the cultural orientations towards religion of the most intensely ideological liberals in Europe, it is undoubtedly a ‘British touch’ that hegemonised the modern liberal ideological matrix in the economic sphere from the outset. In John Locke’s writings we have seen the seeds of a cultural attitude that values individual effort and merit as the moral justification for private property. This attitude certainly reflected the post-feudal context of the English agrarian economy, characterised by the slow process of ‘enclosure’ of arable land, which economic historians, including Marx in *Capital*, have seen as a first step towards the industrial revolution and the rise of capitalism: indeed, subsistence farming progressively gave way to a use of land as a means to realise a profit on commodity markets.

While Locke witnessed and endorsed in the 17th century the ongoing modern transformation of the English agricultural landscape that had begun a century earlier, it is Adam Smith who best represents the development of the liberal matrix in its economic implications in the 18th century. In fact, he becomes the narrator of a nascent era, with the new “division of labour” – the subject of the first three chapters of his *The Wealth of Nations* (1776) – of an economy increasingly dependent on “improvements in machinery” and manufacturing, as well as the expansion of international trade with the new markets of the British colonies of North America and West India, but also of European countries (Holland, Flanders, France, Spain, Portugal, the Italian ducati and dominions) with each other, or with China and the East Indies.

What Adam Smith advances is a true manifesto of economic liberalism as an extension of the natural rights of freedom to the economic sphere. There is a passage in which this link appears very clearly: what should be an “obvious and simple system of natural liberty” implies, in regard to the field of economic production, that “every man, as long as he does not violate the laws of justice, is left perfectly free to pursue his own interests his own way, and to bring both his industry and capital into competition with those of any other man, or order of man” (1776: 914). The fundamental principle of free trade is spelled out in a broader liberal framework that comprises individualism, self-interest and competition.

As is well known, all Smith's work is a forceful defence of *laissez-faire* economics in both domestic and international markets which would set the standards for the economic school of classical liberalism. While outlining the main economic theoretical constructs – from the “invisible hand” of the free market to the law of supply and demand – he also tried to demonstrate the desirability of “the most perfect freedom of commerce” and trade for the economic prosperity of a country and its people, including manufacturers, traders, wage labourers and consumers. His book is thus also an intellectual and political struggle against all those “absurd regulations of commerce” that most states continued to enforce, with Great Britain being “upon the whole, less illiberal and oppressive” (772) in its mercantilist policies to defend national producers. All government action that restrains free trade was thus seen as a sort of economic equivalent of state oppression on individual civil liberties.

The modernity of Smith's arguments is still remarkable, and shows all the ideological continuity between economic and political liberalism. When he criticised the Corn Laws, which already undermined, in England as elsewhere, the “unlimited freedom of the corn trade” (1776: 691), he did so using the same arguments that would be used for the following centuries, and are still used today, in relation to any protectionism and, even, prohibition — for instance on the sale of alcohol or drugs: when the government, in order to deal with a shortage, imposes the price on retailers, it obtains the opposite effect of producing a famine. The only effective prevention of “the miseries of a famine”, on the contrary, consists in the freedom of trade: although it cannot fully remedy the negative consequences of a food shortage, as Adam Smith recognises, it is still “the best palliative of the inconveniences of a dearth; for the inconveniences of a real scarcity cannot be remedied, they can only be palliated” (693). Relying on the virtues of the free market in a logic of ‘risk reduction’ would also – *mutatis mutandis* – be the solution advocated by European liberals and North American libertarians to tackle the ‘miseries’ of drug addiction, while the simple ban imposed by the government would only aggravate them. Again, the basis of the mechanism is less moral than economic: a free market allows for lower prices, and – as Smith noted on the basis of his experience that the inhabitants of southern European countries, where wine is produced and easily

available, are in general the most sober - “the cheapness of wine seems to be a cause, not of drunkenness, but of sobriety” (645).

Similarly, when he explained that the recent multiplication of banking companies in Britain was, like the modern division of labour in any economic area, “advantageous to the public” (436) because of the beneficial effects of free competition (including risk diversification for customers), this principle would have the widest political application; Tocqueville, for instance, would echo Smith when, in his *Democracy in America* (1835-1840), he declared the merits of the freedom – and thus the pluralism – of the press as a guarantee against the formation of any tyrannical majority: “It is an axiom of political science in the United States that the only means of neutralising the effects of newspapers is to multiply their number. I cannot understand how such an evident truth has not become common among us”.<sup>3</sup> What is beneficial for the economic market – freedom, pluralism, competition – also generates positive effects, which outweigh the lesser but necessary evils, in all other spheres of society and politics. This ideological pillar of the liberal matrix is the logical completion of the doctrine of the natural rights to life, liberty and property clearly affirmed by Locke almost a century earlier. It remains to be seen how and by whom these philosophical principles were received and affirmed historically. In this regard, the already observed Franco-British dialectic in the definition of the liberal matrix turned into a Franco-American dialectic, with the Declarations and Constitutions that followed one another between the 1770s and 1790s.

### 4.3. British ideas, French grandeur? The Rights of Man and of the Citizen

Those “British ideas” that Nietzsche deprecated as the main germs, along with Christianity, of the mediocrity of the modern spirit found a highly variable political translation in these fundamental constitutional charters of

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3 Tocqueville added, with an eye to the censorship and laws restraining the freedom of the press enacted several times in France after the Restoration by royalist conservatives, but also by the more ‘liberal’ Orléanists during the July Monarchy of the 1830s: “that the official partisans of the established order and the natural supporters of existing laws believe they are attenuating the action of the press by concentrating it, this is what I cannot conceive” (ibid.).

the history of the United States and France which were written in the last decades of the 18th century. Both the American and French ‘revolutions’ were, in fact, long and complex processes that encompassed very different, and even contrasting philosophical, and political principles. The theoretical framework that I propose here evidences a strong continuity between the Declaration of Independence of 1776 and the Declaration of the Rights of Man and of the Citizen of 1789, and both contribute – but the French one much more clearly – to the definition of liberalism as a modern political ideology. By contrast, there is radical opposition between the meta-political ideological conceptions of the state of the United States Constitution of 1787 on the one hand, and the French Constitution of 1793 on the other: while the American one is a manifesto of the liberal constitutional doctrine of the separation of powers, the French one is a meta-politically illiberal, republican and radically democratic affirmation of the principle of popular sovereignty.

While both Declarations are relatively short and set forth the fundamental inspiring principles of a nation or regime, the Constitutions define the relationships among the various institutional powers and detail the prerogatives of each state body. Hence, from the Declarations we can deduce the ‘polar stars’, and therefore the underlying ideology, or ideologies, which in the view of the drafters should inform politics in that nation; from the Constitutions we derive the positioning of the regime, as expressed by the drafters and their political stakeholders, in regard to the meta-political issue of who should exercise political power, and how and to what extent they should do so. As such, the Constitutions, unless they also incorporate statements of principles as preambles, remain silent about *which* ultimate political goals should take priority, so that those in power can fill them with any kind of politics and policies – ultraconservative, radically liberal or socioeconomically egalitarian.

It is certainly true that the ‘British’ liberal matrix claiming “unalienable Rights” such as, primarily, “life and liberty” was first institutionalised in the United States Declaration of Independence of 1776. The ideologically liberal tendency of the representatives of the thirteen reunited States also seems to emerge from repeated denunciations of “abuses”, “usurpations” and “absolute Despotism” which henceforth must be rejected. However, this Declaration must be taken for what it literally is, a proclamation of

independence from Great Britain and its King, the list of whose misdeeds occupies most of the text. Hence, the Declaration does not spell out any other *political* principle; in fact, it focuses on a rather contingent settling of scores between the finally emancipated colonies and the oppressive former motherland. It is the French, indeed, who proved to be the “best soldiers” of liberal ideas, which they elaborated and formalised in the most coherent way.

The intellectual and political legacy of the French Revolution is understandably very controversial, because the historical process itself presented many contradictions, and the conflicting interpretations by historians and politicians in later centuries would be at least as influential in the perception of posterity as the process itself. Moreover, the first adjective that would be associated today with the French Revolution is probably not ‘liberal’; in fact, the ideas of ‘Terror’ and totalitarian democracy may come to the mind of many. Nevertheless, nothing could better express the political logic of the liberal matrix than the Declaration of the Rights of Man and of the Citizen of 1789. Its preamble, evoking the “natural, inalienable and sacred rights of man”, is clearly indebted to the introduction of the Declaration of Independence. And it should not be forgotten that the 1789 French Declaration was written when the monarchy was still in force and by a National Constituent Assembly made up of nobles, clergy, and ‘third estate’ (bourgeoisie). Among the drafters of the Declaration were the *abbé* Sieyès, an ‘enlightened’ clergyman, and the Marquis de Lafayette, a French aristocrat who fought with the American colonists and was a great admirer of the recent United States Constitution.

While the references to legal rights and due process to avoid arbitrary imprisonment were far from new – they even dated back to the Magna Carta, being then resumed in the Petition of Right of 1628 and the Habeas Corpus Act of 1679; and references to freedom of speech (but limited to Parliament) were included in the Bill of Rights of 1688 – it is neither in the British nor in the American constitutional charters that individual freedom rights are spelled out so clearly. First, in the French Declaration of the Rights of Man and of the Citizen the polar star of ‘freedom’ is clearly established and defined as the possibility of doing “whatever does not harm others”; then, after the formal legal rights of the accused (but “presumed innocent”) have been stated, the ‘new’ liberal tryptic of fundamental

civil rights is solemnly affirmed as comprising the “most precious human rights”: freedom of thought, opinion (“even religious”), and expression (“all Citizens can therefore speak, write, print freely”, within the limits established by law). These are typically ‘negative’ liberties, because they concern the absence of external restraints, such as oppression by an authoritarian state, on the possibility of individual self-expression.

Although these rights were presented as universal human rights, and would be the core principles of the Universal Declaration of Human Rights adopted by the United Nations (with the favourable vote of 48 members states) in 1948, it should not be forgotten that a universalising discourse is inherent in all ideological propositions. The historical and social specificity of the origins of these rights is evident from the fact that they emerged within European (and not, for instance, Asian) cultures and always under the pressure of a nascent bourgeoisie that found an interlocutor in a more dynamic layer of the aristocracy (and certainly not on the initiative of the conservative aristocracy or the rural masses). And the very fact that in the 21st century these rights are far from being considered imprescriptible or, in any case, a priority not only in all countries, but also by all social groups within Western countries should be a clear reminder of the fact that they are constitutive of a modern ideological matrix, the liberal one. This translates concretely into the fact that, while these values attained a hegemonic status in principle, at least in Western countries, their recognition as the main polar star, that is, as a political goal – we summarise it with the term ‘freedom’ – *more important than others* (e.g. the maintenance of order or the pursuit of social justice) is not undisputed; in fact, it depends precisely on a person’s or group’s position within the ideological structure of society.

The non-universal essence of ‘universal’ human rights has been evidenced by examining the historical and social origins of their underlying philosophy. These “natural and imprescriptible human rights”, as can also be read at the beginning of the Declaration of 1789, are “liberty, property, security, and resistance to oppression”, that is, those modern “British ideas” that were first developed in the English parliament by the more modernising upper social strata, with an interest in the policies of the monarchy, especially in relation to trade, taxes and other aspects of economic life. These ideas were then filtered through the historical experience of American independence, in which the burden of British taxation, perceived as unjust

“without representation” of the colonies in Parliament, played a major role; and they found their full accomplishment in the French Declaration, which imported the libertarian ‘touch’ of the 18th century *philosophes* and the revolutionary centrality of a new political subject, the citizen, in opposition to absolute monarchic power.

Yet, nothing could be more wrong than seeing the birth of the political ‘Left’ and the future progressive/socialist camp in the Declaration of 1789, in which the liberal and conservative principle of property – as we have seen, it depends on how it is framed and justified – is asserted as “an inviolable and sacred right” of which “no one can be deprived” (art. 17). The sacredness of the principle of property, however, is also a function of the amount of ‘sacred’ property that must be defended; hence, it is necessarily less sacred to the *sans-culottes* and manual workers than to the aristocrats and the higher bourgeoisie. Likewise, freedom of thought, opinion, and expression was particularly valued, presumably for both professional and intellectual reasons, by lawyers and legal professionals who were the relative majority within the third estate;<sup>4</sup> the same liberal set of rights was not the priority for the peasants, who would not have drawn sustenance from it.

More generally, it must be reiterated that the fundamental polar star of the French Revolution, at least in its first phase, was liberty, and that the word ‘equality’, which was clearly part of its explicit discourse (*liberté, égalité...*) referred to a ‘natural’ equality in individual rights of liberty, far from being understood in the sense of social equality. This point was so important that it constituted article 1 of the Declaration: “Men are born and remain free and equal *in rights*” (my italics).<sup>5</sup>

If I insist on this point, that the modern liberal ideological matrix was essentially ‘done and finished’ with the Declaration of 1789, it is because many other ‘liberal’ individual rights can be derived from that initial cluster of rights. The further liberal battles that would be waged in Western countries in the centuries to come – freedom of the press, political rights

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4 In 1789, among the 578 deputies of the third estate, there were nearly 200 lawyers (Durand 2013). Very significant is also Chateaubriand’s conviction that “the third Estate had taken over the judiciary [...]; it reigned absolutely in it, as judge, lawyer, prosecutor, chancellor, clerk and so on” (1849: 220).

5 The second part of article 1 stated that “social distinctions can only be based on common utility”. The issue of social inequalities was thematised for the first time, but in order to maintain them.

of women, African-American civil rights, abolition of the death penalty, right to divorce and abortion, right to euthanasia, rights of homosexuals, rights of migrants, refugees and asylum-seekers – can largely be seen as logical derivations and ideological extensions of those primary principles affirming the fundamental right to individual self-determination. However, a further philosophical step was necessary – it would be taken by British liberals a century later, as we shall see shortly – with the transition from a negative to a positive (or assertive) view of the rights of liberty.

If it is certainly true that some of these battles were fought, at some moments of history, also by ideologically progressive/socialist forces, it is because these rights can be framed in more liberal or progressive terms and can be pursued by different social coalitions. This also depends on what kind of order is being contested; the extent to which a class dimension is involved in a given struggle; and the contingent ideological nature of the mobilising political forces. Certain issues – namely gender and race – probably exemplify, as we shall see, ideological tendencies that best reflect an ideologically hybrid liberal-progressive matrix. But having said that, in each of these issues there remains a component of individual negative right and the ensuing freedom of a subject to see the legal restrictions on her or his self-realisation removed. For this reason, it is important to grasp the fundamental continuity between the individual freedom rights of the 1789 Declaration and the major political battles carried out by most contemporary (that is, post-1989) Western progressive parties and movements, which tend to have defected, for both political-international and socio-structural reasons, from the egalitarian progressive/socialist matrix and switched to the liberal one. In other words, it is not the French Revolution that was leftist, but the hyper-modern left that has adopted liberal priorities dating back to 1789.

#### **4.4. From liberalism to radical populism: the Revolutionary Constitution of 1793**

The great French break with the Anglo-American liberal tradition, however, occurs with the Constitution of 1793, then with the *Directoire* and the events of the following years, from the Terror to the execution of Robespierre in 1794. This break led France in an illiberal direction, but

not one with a politically social orientation; rather, it was illiberal in the populist sense connected to the metapolitical goal of popular sovereignty. Of course, a certain Rousseauvian echo was already present in the 1789 Declaration, with its appeal to the unitary (and thus anti-pluralistic and antiliberal) notion of “general will” as the basis of the Law (article 6). However, the first revolutionary (but still monarchical) Constitution of 1791 was mainly aimed at specifying the balance of power very much in the spirit of the United States Constitution of 1787; it therefore reflected what we consider today to be a fairly standard liberal-constitutional approach. But in September 1792 the Republic was proclaimed, and a totally new Constitution was prepared by the National Assembly elected in 1792 with universal male suffrage (although with a participation of less than 12% of the electoral body, and excluding those with no income).

Overwhelmingly recruited from among the bourgeoisie, the elected representatives – soon hegemonised by the more radically democratic Montagnards – drafted a republican constitution that did not reject politically liberal rights but instead extended them further, at least formally. Indeed, not only did the Constitution of 1793 incorporate in its first part the main articles of the 1789 Declaration, but it also concluded with an article (122) according to which the Constitution guaranteed a wide range of rights to all French people, including “the indefinite freedom of the press, the right to petition, the right to assemble in popular societies, the enjoyment of all human rights”. The right to private property itself was firmly reaffirmed (article 19), but this time its liberal, rather than conservative, justification was put forward, presenting it as the fruit of the citizen’s labour and industry (articles 16 and 17). Incidentally, some social concerns were also introduced, such as the duty of society to provide means of subsistence to “unfortunate citizens” (article 21), or, in a less conservative-paternalistic and a more liberal-progressive logic, to make education accessible to all citizens (article 22). But this was clearly not the essence of the Revolutionary Constitution of 1793.

While the liberal impulse to affirm the rights of individual liberty was largely prevalent in the Declaration of 1789, it was replaced by an even stronger republican impetus in the National Convention which was to draft the new constitution. But the battle in the ideological field was not ideological in terms of the ‘quid faciam’ of politics: it did not concern, in other

words, the degree to which the Republic should provide a basis for legitimising more conservative, liberal or social-progressive political goals.

The political colour of the Revolution, as observed in the previous chapter, was certainly not ‘conservative’; this was not due to the mere fact that the Revolution was ‘revolutionary’ – conservative revolutions exist, of course – but instead to the targets of the political challenge addressed to a – specifically conservative – political, social and moral order: the King, the aristocracy and the Church. However, the revolutionaries may well have replaced the old order with a new one in which the fundamental structure of property would not change, the national policies on trade and taxation would reflect those of the past, and public order would be enforced by the army or the police. Thus, a different type of conservative-authoritarian political outcome was perfectly possible, at least in principle. Likewise, the revolutionaries could have resolutely sided with the *sans-culottes* and the more popular strata of the workers and therefore opt for a more socialist policy *ante-litteram*, or they could have accommodated the moderate liberal orientations of the provincial Girondins. But the Montagnards were neither workers nor provincial notables; they were largely middle-class petty bourgeois from Paris and other cities. Their ideological orientations stemmed from years of debates and clashes within the Club of Jacobites, where anti-monarchic, republican and then radically democratic ideas came to prevail.

At the National Convention, the fundamental set of questions subject to debate was, in fact, metapolitical: it concerned the institutional arrangement of the new polity and its inspiring philosophy. Who should exercise power in the post-monarchical order? With what kind of institutional balance, if any? And with what degree of direct popular influence? What prevailed was a conception of republic democracy that today we would not hesitate to call radically ‘populist’. After due tribute has been paid to the Declaration of 1789, whose articles covers the first part of the new Constitution, the new ideological core is very clearly manifest. It sees the people as a virtuous and homogeneous body (“the universality of French citizens”) from which sovereignty springs: “Sovereignty resides in the people; it is one and indivisible, imprescriptible and inalienable” (article 25). It prescribes the participation of every citizen in the formation of the law and in the appointment of “officials and agents” (Article 19), so that the elected representatives are only temporary ‘mandataries’, or agents, of the people, as is the case of all public

functions (Article 30). It even sows the seeds of a totalitarian degeneration of democracy by stating that “any individual who usurps sovereignty be instantly put to death by free men” (article 27),<sup>6</sup> and those of its own disruption by declaring that the people has the right and duty to rebel when the government violates their rights (article 35).

In the new ideological framework, not only is the government substantively of the people, by the people, for the people – as per the future Lincolnian formula – but institutional measures such as the imperative mandate, the direct election of public officials (including judges) and their rotation configures a system that is profoundly contrary to the principle of representative government and strongly Rousseauvian in its adherence to a much more direct model of democracy. Moreover, the hyper-centralised conception of the state of the Montagnards removes the separation of powers envisaged by the monarchical constitution (as well as by the American republican one) and designs a functioning of the institutions completely unbalanced in favour of the National Assembly.

The radically democratic and populist essence of the republican phase of the Revolution thus replaced the liberal one of the monarchical period. As regards the democratic populists of the present day, whose primary concern is to restore the principle of popular sovereignty against those who have usurped it, it should be clear that their position reflects a metapolitical ideology that has nothing to do with the political question of how to organise society. The Constitution of 1793 was totally illiberal in metapolitical terms even though it could be used to pursue politically liberal policies, with the advancement of a wide range of individual rights. Up to a certain point, metapolitical and political liberalism can be orthogonal to each other; and, as already noted, both conservative and socialist policies could be implemented within its framework. Rather than defining populism as a ‘thin’ ideology compatible with both left and right ideologies, therefore, it should primarily be regarded as a metapolitical ideology concerning the questions of ‘quis’, ‘quomodo’ and ‘quantum’ of the exercise of political power.

The fact that the Constitution of 1793 was never applied is due to the too rapid realisation of the possibility that it contained within itself, that of a revolutionary dictatorship and the consequent Terror. Again, it was for a

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6 The first and foremost possible usurper of popular sovereignty being, of course, the King.

more effective exercise of power by revolutionary elites threatened by both internal and foreign enemies that the dictatorship was installed, and not to implement any particular programme of social reform or restoration. And if the support for more socially oriented policies has often been noted in the figure of Robespierre, this is far from sufficient to affirm that the political left was born with the French revolution.<sup>7</sup>

A grave misunderstanding arises from yet another related hypothesis, that the term ‘left’ originated from the benches occupied in the 1789 assembly by those who opposed the monarch’s right of veto or by the Montagnards in the 1792 Convention.<sup>8</sup> Whatever the anecdotal origin of the left and right labels, it is a ruinous source of confusion to place there also their ideological origin. As we have seen, two main ideological orientations came to embody the French revolution in two different phases of the process: a liberal ideology (both in metapolitical and political terms), and a republican, populist, radical-democratic metapolitical ideology. A few more decades would pass, however, before the first signs of the progressive-socialist ideological matrix that would subsequently be associated with the political left became apparent.<sup>9</sup>

The shape of the liberal ideological matrix is already defined in its constitutive elements by the end of the 18th century. It includes liberal constitutionalism based on the principle of representative government; the affirmation of individual rights of negative liberty; and the economic principles of free trade and *laissez-faire*. I call them ‘metapolitical’, ‘political’, and ‘economic’ liberalism respectively. It is around the various possible combinations and developments of these three internal dimensions that the future history of liberalism would unfold; but also their intersections with intensity-related axes such as the degree of ideology versus pragmatism or radicalism versus moderation would be decisive, as well as the variable

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7 While Marat, as a radical Jacobin and founder/editor of a newspaper titled *L’Ami du Peuple* (Friend of the People), is sometimes also attributed a radical-left penchant according to contemporary categories, his entire struggle had been, in his own words a few months before he was assassinated, against “the supporters of the old regime and the enemies of liberty” and “the laws serving only to tyrannize [...] the sovereign people” (J.-P. Marat, *L’Ami du Peuple*, March 19, 1793).

8 This historical origin was made famous in the English-speaking world by Lipset (1960), but it is still reported in recent French works on the subject (Le Digol 2018).

9 As Marcel Gauchet (1992) showed, it was not until the beginning of the 20th century that ‘left’ and ‘right’ become the markers of political identity that are still used today.

dilutions with the other two main ideological matrices which translate into hybrid types such as liberal progressivism and liberal conservatism.

But if modern liberal ideology, just like conservative and progressive ideology, has had a remarkably wide range of different historical manifestations, an approach to the study of the ideological field based on the notion of ‘matrix’ serves to reduce the extreme contingency by circumscribing the space of the ‘ideologically possible’. In other words, given a certain matrix, we cannot expect an unlimited range of political-ideological practices and derivations to unfold without transcending the conceptual boundaries of that matrix, even in the presence of nominal belonging to it. A self-defining ‘liberal’ party, politician or citizen will cease to be considered liberal, for analytical purposes, when their position-takings are clearly at odds with the original matrix.

This is the minimum degree of essentialism – one which is, however, historically, sociologically and philosophically grounded – that is necessary to avoid the complete loss of conceptual consistency implied by the most radical anti-essentialist stances, such as those of a postmodern hyper-constructivism for which all meanings can only depend on contingent and constantly evolving inter-subjective definitions. While perhaps satisfactory for the accurate description of an ‘eternal present’, such an approach would be useless in the logic of the (modern) social sciences, for which the possibility to compare phenomena and events across countries and throughout history and to work out meaningful generalisations is decisive and, therefore, non-negotiable. A sort of ‘double bind’ that is present in an ideological matrix approach consists precisely in the tension between parsimony (only three ideological matrices) and consistency (the internal coherence of the diverse manifestations within each matrix).

#### **4.5. Ramifications of early political liberalism**

Within the liberal ideological matrix, the different political expressions that occurred in the French ‘laboratory’ of the early decades of the 19th century provide an excellent overview of its spectrum. It was in post-revolutionary France that the word ‘liberal’ began to be used with its modern ideological meaning. Benjamin Constant used it with reference to the principles of a third, politically less radical phase of the French Revolution,

which began with the Constitution of 1795. With its nearly 400 articles, this charter comprised a panoply of principles and values of every ideological derivation but, despite its philosophical heterogeneity, it re-established a clear separation and relative balance among the executive power (the Directory), the legislative and administrative bodies, and the judiciary. With its precise list of prerogatives and guarantees, rights and duties, appeals to civil liberties but also to public order and morality, this republican constitution was defended by an early self-defining liberal like Constant.

The mould of the liberal matrix was complete by the end of the 18th century, but liberalism emerged as a self-defining ideological movement only at the beginning of the 19th century. With the Restoration of 1815, the new monarchical constitution was also defined as ‘liberal’ in the metapolitical sense of anti-absolutist, and because of some civil liberties that it formally recognised. However, the political dialectic with the ultraroyalists – who portrayed them as dangerous republicans, democrats, and revolutionaries – led the French liberals, who formed a diverse coalition in parliament, towards more radical positions in a climate of growing polarisation. By 1818, three different liberal currents could be distinguished: radical liberals (who supported the radical democracy of the 1793 Constitution); revolutionary liberals (attached to the more moderate principles of 1789); and monarchic liberals (those comfortable under the current constitutional monarchy).<sup>10</sup> While those called ‘revolutionary’ correspond, according to our framework, to a both political and metapolitical liberal matrix, the other two groups exhibited a clear discontinuity between these two dimensions of liberalism. In fact, while the radicals were, as noted in relation to the 1793 Constitution, politically but not metapolitically liberal, the opposite was true of the monarchic liberals, in favour of constitutional guarantees but not so eager to grant equal and extended liberty rights to all citizens, regardless of their property assets and income status.

It is probably in France in the 1820s that the golden age of political liberalism unfolded, with a growing urge to reaffirm the struggle against any political despotism and societal oppression, such as those advocated by conservative ultraroyalists. This intensifying pressure resulted in the July Revolution of 1830, which saw the Bourbons replaced by a King whose

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<sup>10</sup> The exact three denominations were “exaggerated”, “revolutionary”, and “royalist” liberals, respectively, as reported by Rosenblatt (2019: 167).

name would initiate “Orleanism”, a monarchic-liberal current that would remain an ideological referent throughout the century. But when the French liberals were finally in power, and their ideological influence spread throughout Europe, from Italy to Russia, their internal decline also began, due to their political disagreements, their conservative retreats, and the growing social conflict from which the socialist challenge would emerge.

The class dimension was more clearly determinant in British politics, where metapolitical liberalism had been long institutionalised and the word ‘liberal’ was, from the 1830s, the equivalent of ‘democratic’ and stood in opposition to ‘aristocratic’. As the Tories had just changed their name to Conservatives, they were seen by their rivals – and *pour cause* – as the defenders of the aristocracy; but this aristocracy, less immobile than in France and, even more so, in Prussia, was not confined to the old landed nobility and also incorporated the rising strata of bankers, merchants, and manufacturers. The old Whigs were by that time mainly a parliamentary faction representing landed gentry excluded from office and with some remaining territorial strongholds. While they were more likely to express liberal opinions, the real political and social alternative to the conservatives were the ‘liberals’ and the ‘radicals’, two terms that were being used interchangeably by that time.

As can be read in a detailed analysis of the relationships between the Whigs and Liberals in parliament and within society published in the *Westminster Review* in 1837,<sup>11</sup> “the nation is divided into liberals and conservatives” and “the electors are either liberals or conservatives”, so that “a considerable portion of the Liberals are determined no longer to vote for a Whig”. This political division reflected a social division which was becoming evident especially in England, that between “democracy and aristocracy” respectively. In fact, whilst the aristocratic party had previously been divided between two factions (Tories and Whigs), they were now merging together in the Conservative Party. On the other side, “the intelligence of the middling and working-classes” represented the democratic grievances and demands in favour of the “principle of political equality”, to which were hostile not only the old and new aristocrats, but generally also the petty country gentlemen, the shopkeepers, and the parvenus (who would in

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11 The *Westminster Review* was a liberal magazine founded by Jeremy Bentham in 1823 and in which an influential role was played first by James Mill, and then by John Stuart Mill.

fact be intercepted by the Conservative Party once democratisation was accomplished)<sup>12</sup>. However, some more decades would pass before the Whigs disappeared in parliament, where they gave birth in 1859, together with the anti-corn law Peelites of the Conservative Party, to the Liberal Party, now ‘liberal’ in a much more moderate sense than in the first half of the century.

Thus, like any ideology, liberalism has several faces – radical and moderate, revolutionary and bureaucratic, purer and more diluted (‘hybridised’), more ideological and pragmatic. And each of these conceptual pairs has a distinct meaning; it is not synonymous with all the others. Therefore, great variation is possible, as noted, within the same matrix. Within 30 years, the French ideological field had already known a revolutionary liberalism mixed with a republican and radically democratic metapolitical conception of power; a moderate liberal constitutionalism blended with monarchical conservatism; and various other ideological manifestations in between them.

The explanation of these variations resides in factors that are both exogenous and endogenous to the ideological field. Wars, famines, recessions, pandemics, migrations and other contingent events define the externally given context in which the ideological actors define and redefine themselves. In the longer term, more structural processes of societal and economic change also impose exogenous challenges that can determine, depending on the response of ideological actors and the social coalitions that they are able to generate, their rise, decline or disappearance. And political events such as a presidential election, a succession to the throne, a revolution, a new government coalition, or an institutional reform belong among these contextual factors that potentially affect the forms assumed by an ideological matrix. At the endogenous level, these ideological redefinitions affect in turn the relations among the various ideological actors, whose moves determine a change in the relative position of all the others.

Therefore, what kind of liberalism, or any other ideology, prevails in a given historical context is a function of both exogenous processes or events and the consequent endogenous – and profoundly relational – game of strategic repositioning. This game will see the emergence of minority

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12 The reason advanced in this 1837 article is that “aristocratic feelings” were prevalent in these portions of non-aristocratic English society (p. 288). In fact, “In England aristocratic feelings pervade every class of society. In no country in the world, save perhaps India, are the classes so clearly and harshly marked out” (“Terms of alliance between Radicals and Whigs”, in *The London and Westminster Review*, January, 1837: 279-318)

leaders, groups and currents reaching a new dominant status, or the repositioning of old ideological elites as a response to the positions embraced by their rivals within the same matrix, or by ideological enemies belonging to the other matrices. Hence, the origin of the actual ideological forms which the liberal, conservative, and socialist matrices generate in any given circumstance must be sought in this complex mechanism of continuous historical adjustments to external and internal pressures; in the dynamic pattern of relations among ideological actors; in the overall dialectic of ideological movements and counter-movements that respond to longer-term socio-structural change; and, finally, in the need for ideological agents to rethink the social coalitions on which they rely.

In spite of its varieties across and within countries, there is a predominant guise that liberalism assumed in the first half of the 19th century. From Austria to Italy, from Russia to Prussia, from Hungary to Greece, it was prevalently radical, idealistic, and often revolutionary; this was especially the case when it was blended with metapolitical struggles such as those for national self-determination against imperial dominations or for the establishment of a republican constitution. The Italian liberal revolutionary *Carbonari* were protagonists of the revolts which obtained, in 1820 in Naples and 1821 in Turin, anti-absolutist constitutional concessions from the King of the two Sicilies and the King of Sardinia respectively, and organised new uprisings in the aftermath of the liberal French revolution of 1830, especially in cities of the central-northern Italy which belonged to the Papal States. The republican nationalist Giuseppe Mazzini, who founded the Young Italy secret society in 1831, became an archetypal model for the anti-absolutist revolutionary struggles of the following decades, and his thought also inspired pan-Scandinavian Swedish national liberals in the 1850s.

It is true that in the 1830s, among liberals in France, Spain, and Germany a more 'centrist' form began to prevail, one that mainly focused on obtaining or maintaining liberal constitutional reforms against autocratic powers and residual absolute monarchies. The polar star was not individual freedom in these cases, but the rule of law, or *Rechtsstaat*, and this coincided with a liberal constitutional monarchy much more than the extension of civil rights within society. However, those who fought against the conservative order throughout Europe were still, essentially, the liberals, regardless of

whether they were given this political ideological label, or a metapolitical label such as ‘republican’, ‘patriot/nationalist’, or democratic. And if one thinks of the notions of modernity and progress, these were both best embodied by the liberals, at least until the 1830s, as we shall see in the chapter on the progressive/socialist matrix.

If the liberal vs. progressive/socialist ideological bifurcation began, particularly in France, in the 1830s and 1840s, it is with the European revolutions of 1848 that the socialist matrix first manifested its new class-based and potentially disruptive ideological face, especially in Paris, where those revolutions started. From that moment onwards, a different, more moderate liberal face began to prevail, to the point that it often resembled a coproduction of the liberal and conservative matrices.<sup>13</sup> These events were the explosive manifestation of a process that had been incubating for years, and in some cases for nearly two decades, of social critique against liberalism, whose political and economic polar stars did not address the problems increasingly posed by industrialisation, urbanisation and, more generally, socio-economic modernisation (especially in Britain, but also in France); but also by the prospect of political democratisation, where it was clear that the popular masses were beginning to address the issues of poverty and social inequality even in the absence – as in the case of Russian populists – of any sign of capitalist modernity.

After 1848, first Dutch liberalism with Johan Thorbecke (who revised the monarchic constitution in a liberal sense), then British liberalism (in the 1860s and 1870s under the charismatic leadership of William Gladstone) best reflected the moderate face of liberal forces in office. Still in the absence of progressive parliamentary forces representative of the working class, these classical liberal parties remained the main alternatives to conservative-led governments. Their agenda combined a gradual extension of civic and political freedoms, on the one hand, with commercial freedom, low taxation and *laissez-faire* economics on the other (as opposed to a more social, paternalistic or protectionist conservatism). But they were

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13 Alexander Herzen, the most influential Russian liberal thinker in the 1830s, but more inclined to socialist ideas in the following decades, wrote in his letters from France and Italy, after the 1848 revolution: “The liberals, these political Protestants, in turn became the most fearful conservatives; behind the new statutes and the new constitutions they have discovered the spectre of socialism and are whitened with fear” (as reported by Isaiah Berlin, 1953).

undoubtedly parties of the social and political establishment which, in the last decades of the century, were perceived as far from being a radical reform project. More precisely, they had borrowed the conservative polar star seeking the maintenance of a social order which, more an expression of the upper bourgeoisie in Holland, more attentive to the popular strata in Britain, still had to be protected from the risk of subversion represented by the political organizations of the working class. Combining the goals of order and freedom, the Dutch and, in part, British liberals of the second half of the 19th century were thus the bearers of a conservative-liberal hybridisation.

It is also as a reaction to the institutionalisation of this moderate liberalism that the first socially-liberal mutations of the original liberal matrix emerged, both in the Netherlands and Britain. While from the 1870s onwards a new generation of Dutch “young liberals” focused their attention on reforming national education and the school system as a precondition for achieving a more liberal society, it was in the 1880s and 1890s that a socially-oriented opposition emerged within Thorbecke’s liberal party, to the point of giving rise, in 1901, to a new and separate party. Called “liberal-democratic” by using a second Dutch word for “liberal” (*vrijzinnig*), this new party advocated general male and female suffrage, opposed classical economic liberalism and came to theorise the positive role played by the state, ensuring in particular the formation of free citizens through an adequate public education system.<sup>14</sup>

Sometimes classified as social-democratic, this new liberal-democratic party was in fact a manifest expression of a liberal-progressive hybridisation that seemed to characterise British liberals in later years as well. It was after their great electoral success in 1905, but even more markedly with the Asquith government of 1908, that the British liberals displayed a progressive agenda and introduced new social legislation for the working population. But the decision to link freedom with the reduction of social inequalities had matured longer in the cultural milieu of British liberalism. From the point of view of political philosophy, the crucial element has

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14 As te Velde (2019: 224) notes, “Thorbecke’s adherents had assumed that only independent men could become citizens bearing full political rights”. It is in this crucial point that “the new liberals reversed the sequence: because everybody had the right to become a citizen, it was crucial to support and educate the people in order to realize their freedom”.

been grasped by Michael Freedon (2019), who sees in the works of the philosopher Thomas H. Green (1881) and economist John A. Hobson (1909), respectively, the anticipation and the endorsement of a decisive shift in the balance of liberalism from negative liberty as the absence of restraint to positive liberty as the presence of opportunity and ‘capacity to do’ something. This ideological shift also marked a reconciliation of the liberals with a more active role of the state and prefigured the future Welfare State institutions, which would be introduced mainly by two members of the Liberal Party: first Lloyd George in the following years; then, and much more extensively, Lord Beveridge in 1942.

Before deepening the discussion on the ideological status of social liberalism – as an evolution of the liberal matrix or a combination of the liberal and socialist ones – we still need to analyse the origins and meanings of the progressive/socialist matrix. However, we can observe that, once again, there is probably a matter of framing involved. Indeed, positive freedom can be associated on the one hand with the free (theoretical) ‘opportunity’ to do something, and on the other hand with the (effective) power or capacity to do it. While mere freedom of opportunities may remain a relatively empty slogan in the absence of the conditions necessary to pursue such opportunities, ‘capacity’ can imply that either the legislative or socioeconomic prerequisites, or both, are fulfilled. Thus, positive freedom can be thought of as a derivation of the progressive matrix when it implies the existence of a sufficient degree of socioeconomic equality in order for individuals to be able to pursue particular aims (such as, for instance, entering and even succeeding in an elite school or university); but it can also be a derivation of the liberal matrix if the main issue at stake concerns the affirmation of a freedom right that can be positively sanctioned and become law without introducing other forms of regulation or redistribution (as when the legislation affirms the right to same-sex marriage or euthanasia).

And if we return to the main dualism that characterised the liberal matrix well before 1848, the one between metapolitical (i.e. constitutional) and political liberalism, we can also observe in this case the extent to which this conceptual pair is still active today. Metapolitical liberalism opposes both authoritarianism, which annihilates – formally and substantially – the separation of power, and populist conceptions of democracy, which humiliate representation and remove intermediate powers. The main Dutch

'liberal' ruling party since the 2010s, the VVD (People's Party for Freedom and Democracy), for example, is a metapolitically liberal party that carries out conservative-liberal social and economic policies. Conversely, political liberalism pursues a different agenda, with its focus on the preservation and extension of the rights to individual freedom in all areas of daily life: family, migration, health, work, business, finance, commerce, information, consumption, lifestyle, sexuality, reproduction, incarceration, death, and others. Another liberal party in the Netherlands, D66, better reflects this political ideological tendency. While political liberalism is both historically and logically a child of metapolitical liberalism (from John Locke to the 1789 French Constitution), the two dimensions must remain conceptually separate: on the one hand, both conservatives and socialists can adhere to metapolitical liberalism; on the other hand, quite advanced individual (liberal) freedom rights can be advocated by populist, radical and fundamentally illiberal democrats, such as the French revolutionaries of 1793, many European democrats in the second half of the 19th century, the radical progressives of May 1968, or the Italian populists of the Five Star Movement in the 2010s.



## Chapter 5

# The progressive/socialist matrix and its particular principle of equality

### 5.1. From socio-historical structures to symbolic politics: the genesis of the progressive/socialist matrix

The third ideological matrix of modernity, which we here call progressivism/socialism, is conceptually less ambiguous than conservatism, but also more straightforward than liberalism, with its (twofold) metapolitical and political nature. Indeed, the progressive/socialist ideology is political, because it concerns the collective regulation of social and economic life in a more egalitarian direction, while it can espouse, at least in principle, the most diverse metapolitical/institutional arrangements (liberal democracy; other more direct, participatory or deliberative forms of democracy; populist authoritarianism; totalitarianism).

Therefore, the equality of progressives/socialists is not the equality of citizens before the law, because this is an individual right that primarily reflects the liberal ‘polar star’ of freedom, which is – equally – assigned to all individuals by nature and then certified by liberal constitutional charters. Nor is it the equality of citizens in political participation, which identifies a democratic metapolitical principle regarding the *quis*, *quomodo* and *quantum* of the exercise of political power; and universal suffrage is only a precondition for the development of more liberal-democratic or radical-democratic institutional developments, both of which leave, however, the question of political *quid faciam* totally suspended. In effect, the equality of the progressive/socialist matrix is a more specifically socio-economic form of equality which entails, against the conservatives, the overcoming of the traditional hierarchical social order and, against the liberals, a shift of attention from individuals to social groups and their related imbalances.

While the discourse of rights (and duties) is part of the whole story, speaking of *liberal* civil rights, *democratic* political rights, and *progressive* social rights,<sup>1</sup> perhaps as opposed to *conservative* ‘security’ rights (and relative duties), would be too simplistic. The acquisition of social rights by citizens or their provision by the (welfare) state is only one of the ways in which the question of the relations of equality and inequality among social groups has historically been addressed. But the starting point is always the fundamental ‘social question’ of how to guarantee at least decent conditions in terms of standard of living, work, housing, food, education and health to all, and not only to the most privileged strata of the population. In this sense it can be said that the distinctive polar star of the progressive/ socialist matrix in the ‘pure’ state – that is, not hybridised with the liberal matrix – is ‘socio-economic’ equality. It is economic because it concerns, in Marx’s terms, the “material” means of subsistence and conditions of existence; but it is also, and more broadly, social because it is linked to the modern idea of progress and human emancipation, whether through science, technique and ‘social engineering’, or through knowledge, instruction, and education, or both.

Of course, the combination of political progressivism with a metapolitical recipe for its implementation has historically taken different routes, and this has logically also depended on the radicalism (total equality versus reduction of inequalities) with which the polar star of socioeconomic equality has been pursued; and, even more, it has depended on the degree to which the alternative political polar stars of freedom (liberty rights) and order (preserving a traditional social and moral order) have been sacrificed, and even condemned, on the altar of the former. For this reason, the internal variance of historical manifestations of the progressive/socialist matrix is as wide as that of conservatism and liberalism, and comprises socialist, labour/trade union, communist, social-democratic and social-populist movements and regimes in many of their possible forms. While the progressive/socialist label is very broad – as broad as it must be to fit a parsimonious theoretical model – it is less so than the ‘left’ label, which historically has also served to refer to other (non-specifically progressive-socialist) political, metapolitical or ideologically hybrid tendencies such as liberals, democrats, republicans, radicals, feminists, and environmentalists.

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1 The reference is to the famous and always useful historical tripartition of civil, political and social citizenship rights proposed by Thomas H. Marshall (1950).

It must be clear that a historical and sociological expression of the progressive/socialist ideological matrix was virtually non-existent before the 1830s. While Henri de Saint-Simon and Charles Fourier, just like Robert Owen in Britain, may have anticipated in the 1810s and 1820s, in their writings, some of the themes that would later be developed by the socialist movement, it was not until the 'liberal' era of the Orleanist constitutional monarchy – between the July revolution of 1830 and the 1848 revolution – that socialism/progressivism began to arise and develop throughout society as a political ideal. And this did not happen only because France had already experienced a democratic revolution that upset the traditional social order — which did not happen in either the liberal constitutionalism of Great Britain or the conservative authoritarianism of Prussia; it also happened because a new liberal and 'bourgeois' framework of French politics, embodied by figures such as Louis-Philippe d'Orléans, Francois Guizot and Adolphe Thiers, had replaced in 1830 the ultraconservative and aristocratic political and social order of the Bourbons. But while this liberal era had first fuelled hopes and created opportunities for political change, reforms and relative inclusion, it then increasingly resulted in a mix of political conservatism and economic liberalism that, on the one hand, restored press censorship and outlawed Republicans, while, on the other, it failed to address the social problems caused by growing poverty, unemployment and disease (such as the cholera epidemic of 1832).

Moreover, a wave of modernisation had swept through France in the forms of industrialisation and urbanisation, and if the number of industrial workers was not comparable to that of Great Britain, the economic and social fabric of the country were clearly no longer those of 1789: the bourgeoisie had grown in size, power, and wealth; the stock exchange had existed in Paris since the 1820s; factories had been opened, manual workers recruited and artisans displaced; and the aristocracy and, even more, the clergy had been downsized. It was in this context that Marx's scheme originated: the bourgeoisie had replaced, with the French Revolution, the aristocracy as the ruling class, and had now become the social enemy of the emerging working class, which would eventually replace it with a revolutionary struggle. Similarly, capitalism, which had replaced the feudal mode of economic production, would be replaced first by socialism, then by communism. In the ideological field, it is clear that socialism/progressivism took shape

during those two decades as a countermovement to the liberal-conservative rule that in France had replaced the previous ultraconservative order, which originated in turn as a countermovement to the revolutionary breakup of the traditional order that had taken place between 1789 and the end of the Napoleonic empire.<sup>2</sup>

While the socio-structural conditions in Britain were more favourable, in principle, to the early emergence of a broad socialist movement of the working classes, due to the country's more advanced industrialisation and the existence of a new class of industrial workers, it is essentially in the relationships between politics and society that the British delay must be sought. Indeed, the British liberal parliamentary system was historically more established than elsewhere, but it was far from experiencing the levels of democratisation that the French had already known, albeit temporarily, with manhood suffrage after the 1789 Revolution. Parliament was still dominated by elitist Conservatives and Whigs, and the Liberal party would not be constituted before 1859. Early Factory Acts to limit 'laissez-faire' in the exploitation of children and industrial workers were introduced as early as 1802, then regularly extended in the following decades, also under pressure from the unions, which were legalised in 1824. The debates on the Poor Laws and, even more, the Corn Laws occupied the parliamentary agenda between the 1820s and 1840s, with Conservatives in office much more inclined to defend the landed interests than those of the new industrial business class. This overall picture suggests that the politicisation of popular protest in Britain was not about regime change (as in the anti-absolutist movements), nor about social issues (which were addressed by both conservative paternalistic cabinets and pragmatic, rather than doctrinal, workers' organisations); instead, it concerned the rights of workers to democratic participation, as well as further democratic reforms of the political system.

The first important labour movement in Britain, Chartism, did not address a specifically socialist/progressive grievance but, rather, the metapolitical issue of wider popular involvement in political decision-making. And

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2 In the first lines of their *Manifesto of the Communist Party* (1848), Marx and Engels included François Guizot among the main defenders of the European established order: "All the powers of old Europe have entered into a holy alliance to exorcise this spectre [of communism]: Pope and Tsar, Metternich and Guizot, French Radicals and German police-spies".

it did so by proposing in 1838 a “People’s Charter” calling for six reforms of the political system (including manhood suffrage, secret ballot and annual parliamentary elections) and by presenting a petition signed by 1.3 million workers to Parliament. It was only gradually in the following years, but more explicitly in 1848 in the wake of the French uprisings, that the Chartists began to mobilise workers and politicise the movement, not over metapolitical democratic goals but in socioeconomic and class terms.<sup>3</sup> As for the League of the Just – the ‘Christian Communist’ organisation that would give birth to the League of Communists in 1847 in London under the direct impulse of its members Karl Marx and Friedrich Engels – not only was it a tiny group with no mass support in the workers’ movement, but it had only been imported to England in 1841. Founded in Paris in 1836 by German emigrants such as Wilhelm Weitling, Karl Schapper, and Bruno Bauer, the League of the Just participated in 1839 in an uprising in Paris organised among others by the French radical revolutionary Auguste Blanqui, and it was forced to relocate its organisation overseas as a consequence of its repression by the French authorities.

Recalling how both these sociological processes and political events unfolded is important to show that neither a socio-structural account of a country’s ‘macro’ economic and social conditions, nor the ideological struggle in the political field alone are sufficient to explain why, how, and when the progressive/socialist matrix has generated massive movements and, then, parties in different countries. To be sure, the first order of (socio-structural) factors must be seen as a necessary condition for a political-ideological movement (or counter-movement) to take hold: neither liberal nor animal rights movements are likely to emerge in rural societies, just as it is not likely that strong socialist organisations will arise in an ‘arts and crafts’ urban or feudal rural model of the economy, and no ultraconservative nativist countermovement can hope to succeed in modern urban environments. But these necessary ‘objective’ conditions must find an adequate ‘symbolic’ translation in the political-ideological field so that they

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3 A 1848 leaflet calling for a Chartist demonstration in London referred to “Us (the Working Classes)” and declared that “we are the slaves of capital – we demand protection to our labour”, but also reiterated its contention “We are political serfs – we demand to be free”.

can release their potential for historicity and change.<sup>4</sup> In other words, some ideological agents need to politicise the divisions that are latent in the structures of society; and to do so they must first make these divisions visible by attaching symbolic meanings to them – misery, starvation, inequality, class – and have it believed that these concepts are ‘real’ and that there are causal connections between them; ideological agents aim, in other words, to present a compelling representation of what the real world is, and why. Then they must effectively turn these social principles of vision into political principles of division (e.g. exploitation, usurpation, injustice) by targeting a social enemy and advancing an ultimate political goal (the ideological ‘polar star’). Therefore, it is not by adopting one of these opposed – structural vs. symbolic, or political-communicational – forms of epistemological reductionism (and, thus, ‘monofocalism’) that one can account for the genesis and historical affirmation of a political ideology. Rather, a combined approach that could be named ‘symbolic of the structural’ is necessary for this purpose.<sup>5</sup>

## 5.2. Philosophical anticipations of ‘that’ equality

Let us now return to the philosophical and psychosocial seeds that would give birth to modern ideologies, which would then translate into more or less important political movements, parties, or regimes depending on the historical ‘matching’ of the symbolic appeals with the structural conditions of societies. In order to grasp the ideational and perceptual antecedents of the progressive/socialist ideological matrix, I will use the writings of a

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4 And, of course, a more contingent set of political and institutional opportunities is required to increase a movement’s chances of being institutionally successful. For instance, Skocpol (1979: 122-3) attributed the causes of the extraordinary results of the popular uprisings of 1789 in France to a “combination of agrarian structural conditions and national political events”, that is, to the “interaction of existing socioeconomic and political structures with political events in 1789 that reinforced the existing capacities, and created new opportunities, for collective antiseigneurial revolts”. The point of institutional success, however, transcends the purpose of this analysis of the historical genesis of ideologies.

5 I have developed this idea of a combined approach in an article (*Against Communicationism*: <https://www.rivisteweb.it/doi/10.3270/98798>) which also describes (in Italian) the conceptual differences and similarities with another label (“symbolic of the material”) that has been used by Pierre Bourdieu (2015).

remarkably influential philosopher, as I did with Thomas Hobbes' *Leviathan* and John Locke's second *Treatise on Government*. As in the case of Hobbes in relation to the conservative matrix, however, it is necessary to specify that this philosopher – Jean-Jacques Rousseau – is not presented here as the founder of any sort of progressive/socialist ideology.

The foregoing discussion has served precisely to clear the field of this possible misunderstanding: there exists no socialist ideology before the 1830s. In any case, Rousseau, whose main works date back to the 1750s, should not be considered either the spiritual or the founding father of socialism. This would be wrong not only historically, but also philosophically, for the reasons that I will state shortly. On the contrary, my goal here is, as it was with Hobbes, to identify the prepolitical assumptions and anthropological beliefs there are necessary preconditions for the future development of an ideological matrix. Hence, the question is this: who, among those thinkers who proved to be most influential in the affirmation of modernity itself, enunciated a certain vision of the world upon which a future ideology would be founded? And when did they do so, i.e., in what historical and sociological context?

Rousseau advanced a fundamental premise for the future origin of the progressive/socialist matrix precisely and exclusively in relation to the two questions mentioned above: how is the social world (including the 'nature of man' that inhabits it) and why (what causes the world to be the way it is)? Politically (or rather meta-politically), his message, drawn mainly from *The Social Contract* (1762), would go in another and very clear direction: it would be associated with the French revolutionary constitution of 1793, which promoted the radical democratic principle of popular sovereignty as the expression of an unmediated general will: as such, this could not be represented (as in British parliamentarism, which Rousseau deprecated), except at the cost of being totally denied. For this reason, Rousseau is still rightly regarded today as the main reference for those in favour of more direct forms of democracy, and also provides a source of inspiration for populist democrats who believe that the people should be seen as a homogeneous and essentially virtuous body whose potential for sovereignty has been expropriated by partisan representative elites. If this democratic and, at the same time, republican message sounded very radical by the standards of both the British constitutional monarchy and the absolutist regimes that

prevailed elsewhere in Europe in the mid-18th century, it partly reflected the model of the Calvinist Republic of Geneva, which was Rousseau's cultural and personal environment of origin, and the experience of direct democracy in some of the allied cantons of the Swiss Confederacy.

Rousseau's anthropological and social vision of the world differed profoundly from those of both Hobbes and Locke, who he mentioned repeatedly in his works. As is well known, Rousseau thought, contrary to Hobbes, that manhood was essentially good and the state of nature was far from being the state of war of every man against every man which served to justify the Leviathan. Man is, in the state of nature, shy and fearful – the opposite of someone who “seeks only to attack and to fight” (1755: 21), as represented by Hobbes. To the Hobbesian *homo homini lupus*, Rousseau contrasted, in fact, the myth of the “noble savage”. But if the savage, “when he has dined, is at peace with all nature, and the friend of all his fellow men” (61), where are the origins of the world's evils to be found? Rousseau's general reply was “civilisation” of man, by which he meant the overcoming of the state of nature, in particular with the development of metallurgy and agriculture, and the consequent emergence of civil society.

This reply would, in itself, be completely insufficient to found the premises of any socialist matrix, much less a ‘progressive’ one. However, Rousseau's entire *Discourse on the Origin and Basis of Inequality Among Men* (1755) is traversed by the same specification: one problem is at the origin of a civil society not yet regulated by the necessary social contract that would be envisaged by Rousseau himself, and this problem is ‘property’: “The first one who, having fenced off a piece of land, took it into his head to say: This is mine, and found people simple enough to believe him, was the true founder of civil society” (37) and, therefore, the origin of so many “crimes, wars, murders, miseries and horrors”. But this is not yet the main point that anticipates the formation the progressive/socialist matrix, which must be sought in the causal mechanism that links property and the evils of the social world: inequality.

Here arises the great divergence with Locke's *liberal* interpretation of property and inequality, which are perfectly justifiable as long as they are grounded in individual work, effort and, therefore, merit. For Rousseau, on the contrary, from property derive a “devouring ambition”, “competition and rivalry”, a naked “opposition of interest”, the “hidden desire to make

profit at the expense of others” (1755: 43). And all these evils are inherent to what Rousseau calls, in a decisive passage, “the law of property and inequality” (45), because such evils are “the first effect of property and the inseparable procession of nascent inequality”. Private property, in other words, generates inequalities and an erosion of the principles of social relations and human interaction.

But this is not all. If property is identified by Rousseau as the conceptual cause of inequality, who is to be held responsible and, even, guilty? Who should be referred to as the social enemy? It is here that the specifically socio-economic essence of the progressive/socialist matrix finds its clearest philosophical anticipation: it is “the rich”, those persons who made “of an astute usurpation an irrevocable right”; the “few ambitious” persons for whose profit all mankind was “subjected to work, to servitude and to misery” (45); and, as the *Discourse on Inequality* concludes, “a handful of people that are full of superfluences, while a hungry multitude lacks the necessary” (54). Therefore, all political governments like those legitimised by Hobbes are made for the benefit of the “strong”; but because “these words of strong and weak are equivocal”, as Rousseau observed, “the meaning of these terms is best conveyed by those of poor and rich” (46).

Of course, in Rousseau’s *Discourse on Inequality* there is still no reference to ‘social classes’ in the modern sense. And the opposition itself between rich and poor was certainly not new, as suggested, for instance, by the institution of the Tribuns of the Plebs in the Roman Republic. The same opposition was also clear to the philosophers who anticipated the advent of Western modernity by two thousand years. In Plato’s *Republic* (Book VIII) there are explicit references to “the poor” (“*oi pénetes*”), whose victory is at the origin of the establishment of democracy (“while those of the opposing faction are partly exterminated, partly exiled”), and which was born in reaction to the oligarchy, whose ultimate good was wealth (*ploutòs*).<sup>6</sup> The same negative conception of democracy is found in the disciple of Plato, Aristotle, who defines it, in *Politics* (Book III), as that form of government “in the hands of the multitude that governs in the interest of the poor”; democracy is “where the poor (*oi àporoi*) rule”;<sup>7</sup> and, as in Plato, poverty and

6 In the Italian edition (2009) of Plato’s *Republic* with the Greek text opposite, page 869, 557A.

7 Aristotle, *Politics*, again in the Italian edition including the original Greek text, page 87, 1279b.

wealth are the ultimate different foundations for democracy and oligarchy. Unlike Plato and Aristotle, however, Rousseau did not negatively connote ‘the poor’ when introducing the socioeconomic dimension into his analysis of politics. Quite the contrary, he took their side against the minority of the rich, the “usurpers” of wealth and power.

For our purposes, Rousseau’s key contribution consists of a social worldview whereby it is not humanity that is inherently evil; rather, it is a particular social group, characterised by excessive ambition and a greed for wealth, which prevents its collective well-being. This is a distinctive principle of a social vision that differs radically both from the – originally equally optimistic – liberal (and Protestant-inspired) principle of individual responsibility and the – anthropologically more negative – conservative principle of a higher political order preventing chaos and giving organic form to a community. Whether it is the general socioeconomic division between rich and poor or the more specific Marxian class division between workers and bourgeoisie, the progressive/socialist matrix will conceive society as necessarily subject to inter-group opposition or conflict, at least before the polar star of equality is achieved. Hence, given the continuous dialectic between the principles of unity and division which constitutes the fundamental *nomos* of societies and politics, and which reflects respectively a thrust towards centripetal and centrifugal societal movements, the three fundamental ideological matrices of modernity can be arranged along a certain spectrum: from the conservative matrix (unity, centripetal, organic) to the liberal (division, centrifugal, individual), with the progressive/socialist matrix in an intermediate position (between unity and division, tending towards the centripetal but with groups as the fundamental units).

Secondly, Rousseau, by simply pointing to inequality as the most undesirable social principle, laid the foundation for the ideological matrix that would identify equality as its guiding star. As regards Rousseau’s own polar star, this would be – once again – the metapolitical principle of popular sovereignty. The fight against property, on the contrary, cannot be transformed into a positive guiding principle, if not at the price of reducing the entire progressive/socialist matrix to the ultimate attempt to achieve collective, or public, or state ownership. But these are only some of the possible outcomes of this ideological matrix, which encompasses a very wide range of alternatives to the predominance of private property: from communal or cooperative forms of

organisation to state-ownership of all means of production; from nationalisation of core sectors of the economy to state participation in public-private partnerships; to the simple provision of welfare services by the public sector. That said, the analytical focus on the principle of property and its ‘structural’ connection with social inequality – Rousseau’s “law of property and inequality” – isolates a point that would remain of paramount importance in the following centuries and until the present day.

The credit for having anticipated a certain structural feature of this mechanism (the causal link between property and inequality) should be given to the English philosopher Thomas More, whose book of political fiction, *Utopia*, first published by Erasmus in the Flemish city of Leuven in 1516, contains very relevant early-modern reflections on the subject. Far from being an explicit political manifesto – given also More’s position as secretary and personal advisor to King Henry VIII (and as future chancellor dedicated to the persecution of the first English Protestants, in defence of the Catholic Church) – *Utopia* is a semi-satirical dialogue in which the author fantasises about the ideal State (or Commonwealth), along the lines of Plato’s Republic. Some of the politically more compromising statements are not put in the mouth of the author, but in that of a fictional traveller named Hythlodæus (which could be translated as ‘dispenser of nonsense’); However, Thomas More himself did not refrain from harsh criticism of the enclosures of common land by “the nobility and gentry, and even those holy men, the abbots! not contented with the old rents which their farms yielded” (1516: 44), who dispossessed the people of arable land and forced them into misery.

While More, in the final pages of his book, expressed his enthusiastic support for the constitution of Utopia (“this only Commonwealth that truly deserves that name” (250), it is the traveller who congratulates Plato for understanding that “a community of all things” (*koinonìa* being Plato’s original term) and “setting all upon a level was the only way to make a nation happy, which cannot be obtained so long as there is property” (75); and, even more notably, that “till property is taken away, there can be no equitable or just distribution of things, nor can the world be happily governed” (*ibid.*). If considerations about poverty also reflect a fairly classic intuition that Plato, when speculating about the ideal State, attributed in turn to the words of Socrates – “Two other things that guardians [of the City, i.e. the ideal State] will have to monitor with the utmost attention ... wealth

and poverty” (*Ploutós kai penía*) (*The Republic*, Book V)<sup>8</sup> – Thomas More’s implicit insistence on the ‘structural’ nature of this social mechanism is much more inherently modern. Indeed, even making laws to determine the maximum amount of wealth or assets that someone can hold would only be a palliative that, as More’s narrator argues, could “mitigate the disease” but not heal “the body politic [...] as long as property remains” (76). The main shortcoming is that in Thomas More the principle of equality is set as the ultimate objective of the ideal society, but in clearly utopian terms – Utopia being at the same time “*ou-topos*” (no place) and “*eu-topos*” (good place) – and in a historical context in which the essentially ludic framework of this work made it acceptable. However, the reasoning on the social consequences of property anticipates Rousseau’s (historically and politically much more influential) text on the subject.

### 5.3. Proto-socialist historical antecedents of the egalitarian matrix

The constitution of a progressive/socialist matrix passes through the reflections of philosophers on the state of the social universe and the causal relations that are established in it. This is the first dimension of any ideology: the enunciation of beliefs about the state of the world and its causes. Two other decisive steps consist in the definition of an ideological polar star, or a guiding objective for the construction of a ‘better’ social world; and the formation of a collective identity that implies the identification of ideological enemies that prevent the realisation of this better world, and against whom the political battle must be waged (with symbolic or even real weapons, depending on the historical context). A call for action, whether it be a protest in the streets or grassroots mobilisation for electoral campaigning, is part of this component of ideologies.

The significance of political mobilisations at the dawn of modernity should therefore not be underestimated, even if they took place in rural contexts and were imbued with religiosity – thus being far removed from

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8 Wealth and poverty, according to Socrates, should be “monitored” for their social negative consequences: “as producers of luxury, idleness and love of novelty, and the other [poverty], as well as the latter, also the roughness of mind and a scruffy way of working” (2009: 449, 422A).

the context of ‘progress’ and socio-economic, technical and cultural modernisation in which a modern progressive/socialist ideology would take hold later. Mention should be made of the revolt of the German peasants led by the preacher Thomas Müntzer in 1524-25, whose theological discourse of radical reformation included the social message “*omnia sunt communia*” (all things are to be held in common), and which was violently repressed by the local princes with the determined support of Martin Luther. Unlike the Lutheran reform, which appealed to a new moral order without disrupting the traditional social one, the actions of these rebellious peasants were aimed at altering the established late-feudal pattern of political and social order. But, contrary to the late-medieval peasant revolts that had taken place – in 1326 in Flanders, in 1358 in France (*Jacquerie*), in 1381 in England<sup>9</sup> – this revolt was not simply political (against the lords, their taxes, their violence perceived as arbitrary and, thus, unjust); it was accompanied by an ideological message, such as the appeal to a higher moral value (such as equality, or community, or brotherhood) to which the organization of the social world should conform. In this sense, as already noted, even the religious wars following the Reformation were early-modern ‘ideological’ wars.

It was during one of the first political events of modernity – the second English Civil War from 1648, which involved the execution of the King by divine right Charles I – that the Diggers movement emerged. Their political identity began to be defined in 1649, in opposition to Oliver Cromwell and his New Model Army, which [NMA] seemed to be content – before the establishment of Cromwell’s Protectorate and, hence, his personal dictatorship in 1653 – with the simple affirmation of Parliamentarism, with no involvement of popular strata. But the Diggers were also a form of differentiation from the Levellers, a radical movement that fought for metapolitical conquests in a democratic sense but which, in spite of its name, lacked a socially egalitarian vocation. Defining themselves first as the “True Levellers”, they were then renamed “Diggers” in reference to their experiments in common land cultivation, which foreshadowed a form of communal ownership. In what is perhaps the first political song whose original text has come down to us – today known as the Diggers’ Song – the destruction of their common land by the neighbouring landowners is denounced (“Your houses they pull

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9 No mention of more general ideal principles appears, for instance, in Walter Scheidel’s review of these events (2017: 245-51).

down to fright your men in town”); the oppressors are identified in the gentry, in the clergy, in their taxes (the tithes) and in their lawyers and armed knights; and the desired future scenario is invoked (“But the gentry must come down, and the poor shall wear the crown. Stand up now, Diggers all”).

Again, a ‘progressive’ element is still missing, not only because of the largely rural environment in which the Digger movement arose, but also because their political views were very much inspired – as the writings of Protestant religious reformer Gerrard Winstanley, one of their main founders, also suggest – by a ‘communal’ and socially egalitarian interpretation of the Christian message. However, what matters most for the purposes of the constitution of this ideological matrix is the politicisation of equality as the ultimate goal for the organisation of work and society. Again, misery and hunger were not the only immediate levers of political action, which was also accompanied by some ideological justification and objective. Two centuries later, the aforementioned League of the Just would arise again among (German) Protestant Christians, but this time in urban contexts, even if in work places not yet affected by industrialisation, such as that of journeymen (i.e. employees, and not self-employed) artisans. And it was by these adepts of universal brotherhood that, as we have already recalled, the League of Communists of Marx and Engels would be founded in London, but this time within the theoretical framework of modern class conflict. All these egalitarian rural religious movements, therefore, must be taken seriously as bearers of a proto-socialist ideological discourse.

If the lack of ‘progressivism’ does not fulfil one dimension of this ideological matrix of modernity, its twofold name (progressivism/socialism) suggests precisely that sometimes the ‘socialist’ label more accurately describes a political position or movement. While the movements cited so far can be considered pre- or proto-socialist, a distinctive precursor of the progressive/socialist ideology in the context of the advanced French Revolution was Babeuf, in the relatively brief political experience that would lead to his execution by the Directory of the “Thermidorian reaction” in 1797, as a consequence of the so-called “Conspiracy of the Equals”.<sup>10</sup> A journalist of modest social origin and a political agitator, François-Nöel Babeuf would have best embodied the missing link between Rousseau’s *Discourse on Inequalities* and the future

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10 In his defence during the trial at Vendôme (February-May 1797), he is reported to have said: “It says in the volume printed by the court that the draft of this statement is written

socialist movement, if only his interpretation of the French Revolution had not been entirely marginal in that historical event.

Indeed, Babeuf, who significantly dubbed himself “Gracchus” in honour of the homonymous brothers who served as tribunes of the plebs in the Roman Republic, remained virtually the only public figure, along with his comrade Sylvain Maréchal, to defend the immediate extension of the revolutionary principle of equality from ‘merely’ political to *social* equality. For instance, he first contested the surreptitious census suffrage of 1791, then called for a system of progressive taxation and denounced the worsening of the living conditions of the poor under the Directory; but perhaps more importantly, he argued the need to achieve equality “in fact” and not only “by proclamation”.

The “Manifesto of the Equals”, written by Maréchal in 1796, was a vehement plea in favour of the right to obtain that equality which, like Locke’s freedom, was to be seen as a natural right (“living and dying equal, as we were born”). Half a century before Marx’s critique of ‘bourgeois rights’, the equality of the French Revolution was defined by Babeuf and Maréchal as “nothing but a fine and sterile fiction of the law”; on the contrary – so proclaimed the manifesto – “we want real equality or death”: but when we demand real equality “we are told: ‘be quiet, you poor wretches! De facto equality is nothing but a chimera; be satisfied with conditional equality: you are all equal before the law. You vulgar mob’”. Finally, the *Manifeste des égaux* announced the “greater” and “more solemn” revolution of which the French Revolution was “only the herald”, and which would lead to “the common good, or the community of good!”, based on the slogan that “no more individual ownership of the land: the land belongs to no one”.

The social question is the *quid* of politics that the French Revolution, moved by other – primarily metapolitical – objectives, and held in check by the management of internal tensions and international conflicts, had largely neglected. In ideological terms, a call for the redistribution of ownership and wealth, and thus for greater socioeconomic equality, was always present in all these proto-socialist or early-socialist manifestations of the third matrix of modernity. In the modern era, as liberals and democrats were

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in Babeuf’s hand. [...] I tell you that it is only a copy. The original is from the hand of Jean Jacques Rousseau. I have no fear of compromising this new conspirator by mentioning him here, since he can be neither harmed nor tainted by the judgment of this tribunal” (Scott 1967).

fighting for the first time to alter the traditional political order, the main target of these protests was a social order founded on private property solely on behalf of the nobles or clergy (who together owned the overwhelming majority of land holdings), as well as a concentration of wealth that not even the French Revolution had affected.<sup>11</sup>

It is no coincidence that Norberto Bobbio (see section 1.1), who defined himself as a liberal-socialist, refused to include both Babeuf and Thomas More among the legitimate founding fathers of the left, although he differentiated the latter from the right precisely on the basis of the principle (the ‘polar star’) of equality. According to Bobbio, the doctrines advanced by More and Babeuf were not simply *egalitarian*, reflecting a tendency to “reduce social inequality and make natural inequalities less painful” (2016: 64); rather, they aimed at “equality in its more radical formulation”, and therefore were forms of *egalitarianism* – understood as “equality for all in everything” – and also of “dogmatic egalitarianism”, which the Italian political philosopher saw as a common trait in utopias. Equality, and not egalitarianism, should therefore be the generative principle of the political left.

From the point of view of an ideological-matrix approach, however, the more radical the formulation of an ideal polar star is, the more clearly it allows us to grasp the fundamental essence of an ideology, at least in its ‘pure’ type. Babeuf and Maréchal’s formulation of equality is not only radical – it is even somewhat delirious in tone. But they state their ultimate goal with the utmost clarity: “And we will have it, this real equality, at any price”.<sup>12</sup> And this “real equality” is not “equality for all in everything”, but socio-economic equality. The will to use radical means, including the recourse to violence, to achieve this type of equality stands for a radical expression of the egalitarian ideological matrix. Conversely, giving priority to the polar star of equality, even at the expense of potentially competing values such as freedom or ‘a certain order’, corresponds to the ‘pure’ socialist type.

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11 As reported by Piketty (2019: 143): “the concentration of patrimonial holdings remained at an extremely high level between 1789 and 1914”.

12 In order to show that they are ready for anything to achieve it, they recall that “the People have marched over the bodies of the kings and priests who were allied against them” and announce that “they will do the same to the new tyrants [...] who are now seated in the place of the old ones” (*Manifeste des égaux*, retrieved at <https://libertaire.pagesperso-orange.fr/portraits/egaux.htm>, translation my own).

It should be noted that, while radicalism vs. moderation is a conceptual axis orthogonal to each ideology, ‘pureness’ indicates the degree of typicality, the level of adherence of a position to the original matrix. Furthermore, radicalism is a particularly ‘relative’ empirical concept, because the parameter for its assessment changes across historical contexts. Physical violence may be the norm in a civil war; verbal animosity or an aggressive political communication style can be indicators of ideological radicalism in a liberal-constitutional environment. Ideological purity, on the other hand, can be measured with respect to the proximity to or distance from the ‘essential’ ultimate goal represented by the ideal polar star – and not by others – although its concrete historical expression can certainly vary (e.g., equality in the form of highly progressive income taxation; or the suppression of private industries; or provision of universal and extended social services by the welfare state; or policies of affirmative action and positive discrimination to achieve ‘de facto’ equality, etcetera). Therefore, while in practical terms pure types tend to coincide with more radical ideological positions, the two ideas of purity and radicalism must be considered conceptually distinct.

It is sociologically understandable that a person who, like Norberto Bobbio, had striven all his life to combine the two ‘supreme’ values of freedom and equality, without letting one prevail excessively over the other, and who felt that he belonged to the political camp of the left, tried to establish clear ideological boundaries by excluding the bearers of radical egalitarianism. But it is also clear that Bobbio himself should be defined, according to a theoretical framework based on the three matrices of modernity, in terms of the *hybrid* liberal-socialist ideological tendency. Given Bobbio’s particularly strong attachment to liberal-constitutional values, it could also be argued that the liberal matrix (especially in its metapolitical component) was his most genuine ideological environment, albeit with a progressive inclination. Therefore, it is true that Bobbio’s position was very far from that of Babeuf. However, the ideological difference was not only in terms of radicalism, as a simplistic reading in terms of centre-left (Bobbio) vs. extreme-left (Babeuf) would suggest; it was also a difference in nature, since they reflected different ideological matrices.

Historically, however, only limited manifestations of the progressive/socialist matrix in its radical or pure type have occurred. The main European socialist, Labour and social-democratic parties, for example, for most of the twentieth century were located within the progressive/socialist matrix,

albeit combined with the liberal-constitutional metapolitical dimension, without presenting themselves as radical (with respect to the ideological field of the moment), nor in the pure state (a certain degree of hybridisation with the liberal and conservative matrices was the inevitable consequence of their involvement in the national government and more generally in the democratic parliamentary process).

An egalitarian matrix was, therefore, available, if not yet socially rooted, in the ideological field at the end of the 18th century: its founding elements were the principles of social equality, economic redistribution and the critique of private property, with particular reference to land ownership in the hands of a few social groups of ‘usurpers’ (nobility, gentry, clergy). Its specific ‘modernity’ consisted precisely in the appeal to an ideological ‘polar star’ such as equality as the moral foundation of political action. Whether these appeals were inspired by some egalitarian interpretation of Christianity (as in Thomas Münster, Thomas More, or the Diggers) or by rationalistic claims of equality among people as a natural right (as in Rousseau, but also in Babeuf), it is in the presence of this ideological element that they differed from other sporadic violent revolts against the feudal landlords or simple riots over grain, bread, and other food.

#### **5.4. When progress turns social: the French ideologists of the 1830s**

The full constitution of a modern progressive/socialist matrix, as anticipated above, requires the deployment of other societal, economic, technological and cultural transformations which found its first ideological translations and political manifestations in the 1830s. The normative idea of ‘progress’ is associated with processes of socioeconomic and cultural modernisation that were triggered by the Industrial Revolution, and thus by technological innovation, diversification of goods, rise of a capitalist bourgeoisie, concentration of labour in factories, and urbanisation. The cultural consequences of these accelerated transformations were not only the strengthening of the modern idea – already present in the Enlightenment – of trust in critical reason as a means to liberate people from the oppression of the traditional religious and political order; but also the fusion of this cultural orientation with a ‘progressive’ perception of the course of

history: humanity was seen as progressing towards higher levels and forms of emancipation permitted by technology, science and scientific knowledge, education, and new ways to produce wealth.

The progressive/socialist ideological matrix has a root that is partly common to the liberal one, because both of them are the offspring of cultural modernity. This is why it would be problematic to call it only ‘progressive’ — a “progressive spirit” was already present in the *Encyclopédie* of Diderot, d’Alembert, Voltaire and Turgot (who, already in 1750, defined ‘progress’ as a chain of human advances made possible by economic growth)<sup>13</sup>, as well as in Adam Smith. The Marquis de Condorcet also linked the idea of political progress to liberal concerns such as the disappearance of slavery and prison reforms. Contrary to previous Christian conceptions of human history as a linear path towards a definite ultimate goal, progress was now determined by man, not by Providence. But the eighteenth-century idea of progress, as well as reason, freedom, equality and emancipation, was still fundamentally detached from the ‘social question’.

In fact, progress as conceived within the nineteenth-century progressive/socialist matrix is a stronger and different idea at the same time. We have already mentioned why the belief that history was destined for the improvement of the human condition was strengthened: science, technology, industry in the context of an expanding market economy and in the framework of recent constitutional freedoms. But the idea of progress that rapidly advanced in the first half of the 19th century was also of different nature, for it was now seen in relation to new possibilities in terms of social organisation. Society could be reorganised through politics – and not by relying on the beneficial effects of the free market through its invisible hand – in order to ensure that the fruits of human progress also reached the popular classes. But this confidence in the capabilities of social engineering could not have flourished on the basis of technical-scientific modernisation alone – it also required a more complex framework of historical-political conditions.

The anti-absolutist struggle for the fundamental individual liberties had been won, at least in Britain and in France; liberal and radical forms of democratic sovereignty had already been experienced, in the United States and in the aftermath of the French Revolution; in the Napoleonic era a

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13 “*Tableau philosophique des progrès successifs de l’esprit humain*”, a speech on the “successive advances of the human mind” that Turgot delivered in Latin at the Sorbonne in 1750.

modernisation of the legal code had spread to several European countries; the bourgeoisie was a growing force in modernising societies and in the political field; and increasing numbers of manual workers were concentrating in the cities for the job opportunities offered by the manufacturing industry. Nevertheless, the living conditions of the popular strata, to which the modern economic organisation offered at least survival in the cities, continued to be meagre in terms of income, housing, health, work. This was due to the fact that in the preceding decades industrial capitalism had grown under unrepeatable conditions of *laissez faire*, that is, in the most economically liberal form that Western Europe has ever known, the mirror of which was the substantial absence of state regulation of work in factories.

This picture may be known, but perhaps less clear is the fact that here, within this historically situated picture, the common ideological matrix of modernity hostile to traditional order splits, like a railway line that after a junction takes two different directions. This is why there are three – and not two – matrices needed to understand modern and contemporary politics, and ‘left and right’ is an inadequate representation of political space: because there was no political left in the contemporary sense before the mid-19th century, just as there will always be, in the following two centuries, a distinctly liberal position that is neither specifically ‘left’ nor ‘right’, and which still less can be reduced to such an ideological void as the notion of ‘centre’. And if the liberals were, in an etymological sense, ‘progressive’, the progressives we speak of in this chapter inhabit a totally different ideological matrix.

The rise of the idea of progress is evident from a quantitative indicator, the annual frequency of the words “progress” and “*progrès*” in books published in English and French.<sup>14</sup> As shown in figure 5.1, the word was already being used in 1800 (when the first records are available), but it is in particular between the 1830s and the 1860s that a peak of use appears in France; in Britain, the epicentre of the industrial revolution, the peak appears earlier, starting in the 1810s, and lasts for at least four decades. This is, however, only the first and more general part of the story, as the generic use of the word “progress” has indeed remained relatively constant throughout the century. What matters most, in fact, is how the meaning of the idea of progress changes over time. An excellent indicator of this change comes

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14 Data source: Google Book Ngram Viewer, which computes the percentage of occurrences of a given word over the total number of words; Corpus: French, British-English;

from inspection of the adjectives most frequently associated with the word “progress”. While until the early decades of the 19th century it was often associated with the generic adjectives “rapid” and “considerable”,<sup>15</sup> quite suddenly the adjective ‘social’ began to appear in non-fiction literature. In France, for instance, the *Revue du Progrès social* started its publications in 1834, and a book entitled “*Du progrès social au profit des classes populaires non indigentes*” appeared in 1847, followed by “*Plan d’une réorganisation disciplinaire des classes industrielles en France*”.<sup>16</sup> But neither the timing nor the success of this social framing of progress were exactly the same in the two countries: the use of the expression *progrès social* began at the end of the 1820s and reached its first peak in 1850; the rise of ‘social progress’ was, on the contrary, slower, and only in the 1850s did it approach the frequency of the French usage (but without the French social reform-oriented connotation).

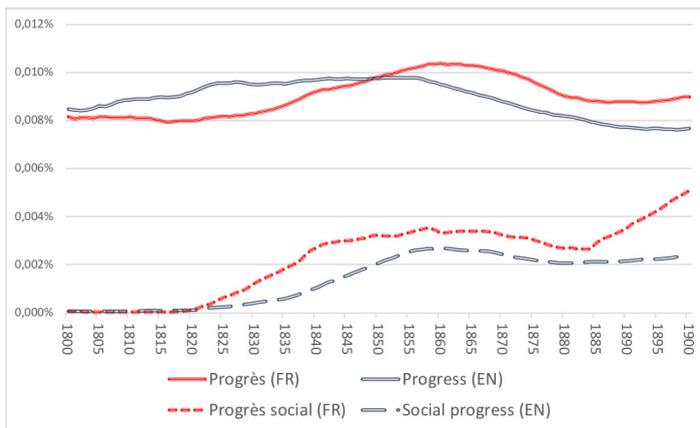


Figure 5.1. Occurrences of “progress” and “progrès”, “social progress” and “progrès social” in British and French non-fiction literature between 1800 and 1900 (data source: Google Book Ngram Viewer). Note: To increase the visual comparability of the trends, the occurrences of the specific expressions “social progress” and “social progress” have been multiplied by 50.

Years: 1800-1900.

- 15 In French, in the plural form of “progrès rapides” and “progrès considérables”.
- 16 The English translations of these titles are “On social progress for the benefit of the non-indigent popular classes” and “Plan for the disciplinary reorganisation of the industrial classes in France”.

The progressive-socialist hegemony of the idea of progress over a liberal one was neither immediate nor sudden, of course. Saint-Simon's works and social-economic doctrine best illustrates this transition from a liberal to a socialist conception of progress. While Marx and Engels famously classified him among the 'utopian socialists' (because the dimension of class conflict was absent from his view, much like a critique of capitalism), we can now see in retrospect that Saint-Simon acted as an intellectual bridge between the liberal and the socialist matrix: although far from envisioning a socialist political philosophy, he anticipated the theme of industrial society from which the progressive/socialist matrix would originate in the following couple of decades. Born an aristocrat, he was the most influential witness of the dawn of industrial modernity in France. It was also from his position as an entrepreneur that he developed his ideas on the need for the "industrial class", which included manufacturers and workers, traders and farmers, to achieve the social importance that they deserved, possibly by forming an industrial party in alliance with scientists and bankers and in opposition to the unproductive class of nobles, jurists, soldiers, rentiers and public officials. The nation should be led, for Saint-Simon, by this industrial class, whose political support must meanwhile be directed towards the ideologically moderate parliamentary forces, because acts of violence and coups d'état, the events most feared by producers, are more likely to be performed by the extreme left and right.<sup>17</sup>

In Saint-Simon's writings *L'Industrie, Du système industriel*, and *Catéchisme des industriels*, all written between 1816 and 1824, industrial progress is associated with notions that we would now call positivism, scientism, meritocracy.

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17 These explicit propositions can be read in *Catéchisme des industriels* (1824-25). In the French Parliament of the early 1820s, left and right were, at that time, fundamentally metapolitical, because they were primarily concerned with the scope of liberal constitutionalism, which saw the two extreme opposite poles in the ultra-royalists, on the one hand, and liberals like Benjamin Constant on the other. A virtual 'extreme left' marked by nostalgia for revolutionary democratic republicanism was absent from parliament at the time. The republicans would re-enter the French parliament only in the 1830s, while the first elected representatives echoing the progressive/socialist matrix were the democratic socialists of (The "Mountain" led by Ledru-Rollin, which obtained 9.1% of the votes in the elections of 1848 and then received fully 29.6% in the following year. While the name "La Montagne" was inspired by the radical democratic *Montagnards* of the French Revolution, its members' moderate orientation in the aftermath of the 1848 Revolution made it one of the targets of Marx's famous remark that historical phenomena appear twice, "the first as tragedy, then as a farce" (1852).

His emphasis on both individual merit and scientific knowledge made him appreciated also by a liberal political thinker like John Stuart Mill. But he exercised his most direct influence on his disciple Auguste Comte, whose importance is mainly associated with the emergence of modern social sciences through the positivist impetus of studying society with a scientific approach (he famously coined the word “sociology”). The ideological importance of Saint-Simon therefore resides not in an alleged anticipation of the socialist matrix, but rather of industrial society, which he thematised for the first time in close connection with scientific and social progress. Although scarcely known in his lifetime, Saint-Simon’s works would prove influential on the next generation of economists and social reformers, who, often from the liberal ideological matrix, would be increasingly critical of the Guizot-style liberalism in power after the Revolution of 1830, and who more and more frequently would find themselves facing the bifurcation with the emerging progressive/socialist matrix.

It was in those years that Louis Blanc, whose influence in the definition of the progressive-socialist matrix reached its peak in conjunction with the Revolution of 1848,<sup>18</sup> developed his critique of the July Monarchy in his book *Histoire de dix ans 1830-1840* and, more importantly, spelled out his socialist reformist ideas in the journal that he founded in 1839 (*Revue du Progrès*), as well as in his study on *L’organisation du travail*, published in the same year. For Blanc, the (free) market and the (liberal) economic principle of competition were causes of collective impoverishment that affected both the workers and the unemployed, to the benefit of the financial high bourgeoisie. His social and political recipe can be seen today as a mix of cooperative-based and state-controlled economy. Work should have been organised on the basis of social workshops in which all workers received the same wage. A democratic state would control these cooperatives (*ateliers sociaux*) at least during a first phase, in order to prevent their being crushed by free market forces.

This is where Blanc’s socialist political ideology intersects with a republican and democratic metapolitical position. Close to republican politicians like Ledru-Rollin, he was in favour of a truly universal suffrage, which he

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18 The number of occurrences of his name (Louis Blanc) spikes, in both French and English books, in the ten years around the mid-19th century (Data source: Google Book Ngram Viewer).

considered the best guarantee of a democratic state under popular control. Blanc's political views gained a much greater following among the middle rather than the working classes, and in fact he envisaged an idea of class interdependence rather than opposition or conflict. Nevertheless, his dedication to thematising the social question, his hostility to what would later be known as "capitalism" (he is known to be the first author to use this word) based on profit and *concurrence*, and his attempts to conceive an alternative model for the political organisation of work and society, make him one of the first, fundamental expressions of the modern progressive/socialist matrix.

It was also in opposition to Louis Blanc's political socialism, one which assigned a central role to the state, that Proudhon defined his ideological system, which would provide the basis for a sort of libertarian, bottom-up variant of the progressive/socialist matrix. Proudhon, the best-known socialist thinker at the time of the 1848 revolution, also remained the most influential reference for the progressive camp in France throughout the 19th century. But his direct influence was also enormous on the development of Marx's thought in the 1840s, especially as regards the critique of private property in the manufacturing industry and the recognition of the centrality of political economy over institutional politics in determining the organisation of industrial society.

Having read the works of classical economists such as Smith, Ricardo, Malthus, Say, and the young John Stuart Mill, Proudhon was the first to place the relationship between capitalist and labourer at the centre of the problem of social inequality, thus anticipating some of the foundations of Marx's economic theory. In *What Is Property?* (1840), he observed that "the labour of the workers has created value; and this value is their property. But they neither sold nor traded it; and you, capitalist, you did not acquire it" (40); therefore, what "the capitalist owes to the producer, and which he never returns to him" is but a form of "exploitation of man by man" (95). But the solution, for Proudhon, could not be found in the state, as Blanc was claiming.

As he virulently argued in his *System of Economic Contradictions: the Philosophy of Poverty* (1846), "according to M Blanc, the remedy for competition [...] consists in the intervention of authority, in the substitution of the State for individual liberty" (256). More precisely, Proudhon summarised

Blanc's system in three exclusive points: "1. To give power a great force of initiative, — that is, in plain English, to make absolutism omnipotent in order to realise a utopia; 2. To establish public workshops, and supply them with capital, at the State's expense; 3. To extinguish private industry by the competition of national industry. And that is all" (257). For Proudhon, on the contrary, the solution must be sought in forms of ownership and self-organisation of production by workers in associations or, as he specified in his later writings, in mutualism, that is, in the collective creation of a number of mutuality institutions, such as mutual insurance and mutual credit (1863).<sup>19</sup> In any case, Proudhon's anti-capitalist conception of social and economic organisation envisaged decentralised solutions autonomous from the state. He thus integrated the progressive matrix with a libertarian socialist approach, which would also be favoured by Bakunin's anarchists in the following decades.<sup>20</sup>

Proudhon's intellectual and personal trajectory reflected the possibilities that cohabited in the progressive/socialist matrix from its origins: while he was clearly in favour of a much more egalitarian social order, he did not believe in the political order envisioned by democratic republicans, and he defended — he came from a family of modest and semi-rural origin in the French provinces — a fairly traditional morality, especially in relation to the family and the role of women. His response to the key question of property — too often reduced to the famous phrase "*La propriété, c'est le vol*" (Property is theft) — certainly did not consist in the abolition of all forms of individual ownership, which in fact he favoured for small property. But he advocated

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19 His mutualist positions are enounced in particular in *Du Principe fédératif et de la nécessité de reconstituer le Parti de la Révolution* (1863).

20 An entire book could, of course, be devoted to the ideological relations of anarchists with the progressive/socialist matrix, from the 1871 Paris Commune to their expulsions from the First International in 1872 and the Second International in 1896. We note, however, that the anarchist movement itself has famously been traversed by a continuous tension between a more collectivist (or communist) and a more individualist tendency. These can respectively be seen as approaching the radical progressive/socialist and the radical liberal pole of progressive/liberal ideological hybridisations having different combinations of equality and freedom as their polar stars. North American libertarians from the second half of the 20<sup>th</sup> century onwards must be viewed, in terms of the theoretical framework of this book, as a radical (and relatively 'pure') development of the liberal matrix, their contingent alignment with the so-called "conservative" camp in the United States having nothing to do with the ideological features of the conservative matrix of order.

small-scale collective ownership of capital, seen as a result of collective value creation, and supported social ownership through worker cooperatives. Although Marx would harshly criticise Proudhon, notably by writing *The Poverty of Philosophy*, which was a response to the French socialist's *Philosophy of Poverty* – probably also, as Proudhon himself would observe, to deny the primogeniture of his ideas – he nevertheless described *What is Property?* as an epoch-making work.<sup>21</sup>

From the point of view of the development of the progressive/socialist matrix, Marx's main contribution was not only to make the theme of work – as a generative principle of economic value and pivot of social organisation – even more central, but above all, and obviously, to affirm, both with his dialectical philosophy of history and with his communist ideological manifesto, the class struggle of the workers against the capitalist bourgeoisie as the fundamental mechanism of historical change. The social tendency that we have observed in all the forerunners of the progressive/socialist matrix to identify a social group as responsible for human oppression and social injustice is therefore ratified by a completely dichotomous worldview that opposed a specific ruling class and the proletariat. But it is also the principle of equality that underwent a further evolution: whilst the first socialists had detached it from its association with political rights and individual liberty and affirmed it in social and economic terms, with Marx equality became deeply intertwined with work in the context of modern mass industrial society. This labour-related and class-based conception of the struggle for equality would henceforth be the hallmark of the entire Marxist component of the progressive/socialist matrix.

There is a further distinctive element in Marx's contribution to the egalitarian matrix of modernity. By fundamentally shifting the emphasis from politics to the economy – because it was the superseding of the capitalist mode of production, and not a political-institutional recipe, that would lead to an egalitarian communist society – he spawned a politically underspecified ideology that was liable to different political interpretations. Since, however, Marx himself incidentally mentioned the need for a transitory phase in which a dictatorship of the proletariat would facilitate the transition to a socialist

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21 This judgement is in the obituary that Marx wrote on the occasion of Proudhon's death in 1865.

mode of production,<sup>22</sup> it is this political formula that would prevail in Lenin's revolutionary and institutional implementation of Marxism. While historians and political philosophers have often argued that a totalitarian outcome was inherent in the dependence of Marx's communism – if not on the state (at least in principle) – on the triumph of a specific social class, as well as in its radically egalitarian ideology, this meta-political question must not, in fact, be considered part of the (political) ideological matrix.

The differences among Blanc, Proudhon and Marx concern the question of how (*quomodo*) the relationship between state and society should be institutionalised; they also differ in the extent to which they viewed socioeconomic equality as the unique guiding star of their political commitment or, conversely, one to be combined with recognition of the importance of ensuring individual liberties and maintaining a certain political or moral order. They differed, in other words, in the extent to which their ideological positions approached the 'pure' progressive/socialist type and how they conceived the forms and limitations of state power. The fundamental *quid* of politics – the ultimate goal of politically concerted action – was, however, well rooted in the issue of equality, a kind of equality that was not so much about individual liberties as about socioeconomic relations among social groups, and revolved around the themes of property, labour, economic production and the distribution of wealth. In this sense, these ideologues were all part of the same progressive/socialist matrix, the founding theoretical elements of which would be virtually complete within a few decades.

## 5.5. A repertoire of early ideological manifestations of the progressive/socialist matrix

While the German Social-democratic Party (SPD) was officially founded in 1890, its roots extended back to the 1860s, when the German socialist

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22 In a letter dated March 5, 1852, Marx responded to Joseph Weydemeyer – an early Marxist journalist who several weeks before had published an article in the New York *Turn-Zeitung* entitled "Dictatorship of the Proletariat" – by emphasising the following three points: "(1) the existence of classes is only bound up with particular historical phases in the development of production, (2) the class struggle necessarily leads to the dictatorship of the proletariat, (3) this dictatorship itself only constitutes the transition to the abolition of all classes and to a classless society" (Marx and Engels 1983, vol. 39: 62-65).

Ferdinand Lassalle managed to organise a first socialist party, well before France, Britain and all other countries. The main target of Lassalle's political struggle was not, however, the conservatives – on the contrary, he found in Bismarck an interested interlocutor, who is credited for having implemented, after 1878, his policies of “monarchic socialism” also on the basis of Lassalle's enduring inspiration.<sup>23</sup> Instead, his struggle was still, at that time (shortly before his death in 1864), to convince German workers that they should not rely on the liberal party (at that time called the “German Progress” party), which was the party of a bourgeoisie that was still afraid of extending suffrage beyond the upper classes. And the same struggle was, incidentally, that of Joseph Weydemeyer, the first German Marxist agitator in New York City, who had stigmatised American Liberal groups since the 1950s for their enthusiastic support of free elections and parliamentary democracy in Europe and their patent disregard for the social question and the workers' movement.

Besides positioning the German socialist movement within a triangular relationship with liberals and conservatives – reflecting a typical process of demarcation among the three matrices – Lassalle participated in the definition of the German progressive/socialist matrix through his dialectic with the other agents within the same matrix in the ideological field. Indeed, he distanced himself from Marx and Engels, with whom he had a correspondence, advocating the role of the state, state legislation and ‘welfare’ measures to tackle the social question. Hence, state reform was a preliminary condition for Lassalle, who for this reason gave strategic priority to the metapolitical battle in favour of universal suffrage. When, in 1875, the nascent Social Democratic Party initiated a process to define its political platform, Marx deprecated the result – in his *Critique of the Gotha Programme* – precisely on the grounds of its Lassallian component, too inclined to pursue the interests of the workers' movement through government concessions and subsequent state reform.<sup>24</sup> It was only with the Erfurt programme

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23 Hostile to liberal constitutionalism, Lassalle wrote that he would be ready to support the monarchy only if it became “a social monarchy” (Butler 1941: 134).

24 This point not only anticipated the long dispute between reformist and revolutionary socialists which would also characterise the dialectic between Kautsky and Bernstein within the SPD; more importantly, it re-proposed the opposition between the political (contingent) and economic (structural) path to socialism, the latter supported by Marx and Engels, of course.

following the official birth of the SPD that the German party would opt, in its first phase, for a more radically Marxist ideological orientation.

In Britain, the definition of the progressive/socialist matrix, while it certainly did not occur in isolation from the French and, even more so, German socialist ideological tendencies, was nevertheless characterised by the historically distinctive connection of trade unionism and democratic radicalism. On the one hand, early industrialisation and urbanisation had been accompanied by an early legalisation of trade unions by a liberal constitutional polity little inclined to authoritarian repression. On the other hand, the pragmatic defence of workers' rights had been intertwined, since the 'social turn' of the radical democratic Chartists in 1848, with the battle for political rights and enlarged electoral participation. When, in around 1890, the German Social Democrats opted for a Marxist platform and the French progressives were still divided into different currents and lagged behind in terms of party organisation, the British socialists were probably best represented by Fabianism, a socialist democratic movement that proved influential both on the future origin of the Labour Party in 1906 and on its launch as a mass party in 1918. In 1899, this intellectual and predominantly middle-class movement called the Fabian Society spelled out its conception of socialism in a series of writings known as "Fabian Essays in Socialism".<sup>25</sup>

Social and natural evolutionism – the former theorised earlier by Saint-Simon and Comte, the latter later by Charles Darwin, with the greatly influential Herbert Spencer disseminating his synthesis of the two forms of evolution in the last decades of the century – strongly contributed to affirming a dynamic and gradualist vision of the social world, especially in Britain. This is why the Fabian socialists rejected the ideal societies – now perceived as 'static' – of the French theorists and utopians. At the same time, socialism was seen as deeply interconnected with "the irresistible progress of democracy" in the era of the industrial revolution. But while distancing themselves from the 'pre-evolutionary socialists', the Fabians also stigmatised the radical democrats for failing to recognise that "the root of the difficulty is economic" and aiming at mere "political levelling". In opposition to both the "purely political Radicals" and "the mere Utopians",

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25 These essays were edited for publication by George Bernard Shaw, the famous playwright, but also an influential political activist who joined the Fabian Society on its founding in 1884.

they argued that socialism consisted simply of “the economic side of the democratic idea”. The outcome of democracy would thus be an extension of the principle of people’s control from the political organisation of society to the production of wealth, so as to promote the “gradual substitution of organised cooperation for the anarchy of the competitive struggle”.<sup>26</sup> But this socialist fulfilment of the democratic principle should be achieved only with the logic of democracy itself, that is, after having been accepted by the majority of the people, and therefore gradually, constitutionally and peacefully.

In analytical terms, this democratic interpretation of socialism, which would always be prevalent in Britain, did not alter the already existing progressive/socialist matrix, and limited itself to proposing temporary measures such as the taxation of rent and interest, the abolition of all fees in public elementary schools, the general recognition of a minimum wage and a maximum working day in factories, and the provision of welfare services for the elderly, the sick and the unemployed.<sup>27</sup> More importantly, it firmly attached the British political progressive/socialist matrix to the meta-political democratic framework, thus preventing it from adopting the formula of the “dictatorship of the proletariat” and legitimising possible totalitarian outcomes in the future. Nevertheless, the polar star of socioeconomic equality through the replacement of private capital with some form of common ownership, even if underspecified, made the British type of the matrix as ‘pure’ as others from a political-ideological point of view (that is, leaving aside the democratic metapolitical slant).

Beyond the French, British and German cases, a significant variant of the egalitarian matrix is represented by the experience of the Russian populists

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26 This definition was given in a paper entitled “The basis of socialism”, by Sidney Webb, one of the founders of the London School of Economics and future drafter of Clause IV of the Labour Party constitution, adopted in 1918. This section (Clause IV) of the text focused on the party’s values and explicitly referred to “the common ownership of the means of production, distribution and exchange” in order to secure “the most equitable distribution”. When it came to power in 1945, the Labour Party interpreted common ownership – which could also have meant municipal ownership or worker cooperatives – as the result of a nationalisation policy, which first involved the Bank of England between 1946 and 1951, then railways and telecommunications, coal and steel industries, as well as gas and electricity production. Furthermore, the National Health System was started in 1948.

27 These measures are outlined in the first part of the *Fabian Essays in Socialism*.

(*Narodniki*), a heterogeneous movement that characterised the post-liberal (and pre-Marxist) opposition to the Tsarist regime in Russia, especially between 1860 and 1880. The singularity of this case is due to the minimum level of industrialisation in Russia in the mid-19th century, which, in conjunction with the autocratic nature of the political regime, raises doubts over the possibility that a progressive-socialist ideology could emerge. Does an essentially rural, and therefore pre-modern, socioeconomic structure provide the conditions for a modern egalitarian matrix to take hold? Indeed, the small groups of so-called “Russian populists” advocated social justice and equality for the rural workers (servants or free), who constituted over nine-tenths of the population, and their miserable living conditions. They generally had in mind an ideal model of an egalitarian society, one based on an agricultural community called “Mir”, organised as a collective unit of free peasants. As such, it is often referred to as an ideological form of ‘agrarian socialism’.

If the experience of Russian populists can be included in the modern progressive/socialist matrix, it is not only because of the strong permeability of 19th-century Russia to the French cultural and political ideas (which popularised first liberal thinkers and then utopian socialists among Russian ideologues). It is also because, despite the objective absence of progressive horizons in the Russian context of the time, some abstract ultimate goals were advanced, by mainly middle-class ideologues, which could be assimilated to the socialist, if not strictly progressive, move of ideological modernity.

Much more than the early modern British Diggers, these groups were actually involved in the modern ideological field, which consisted of a network of (mainly triangular) relationships between conservative, liberal, and progressive/socialist forces and agents. Just as in most Western European countries in the same period (the decades following the revolution of 1848), these egalitarian populists defined themselves primarily in opposition to liberal parties, which appeared to be largely disconnected from the politically emerging but socially marginal popular strata, and tended to adhere to the grievances of the radical and democratic currents, which were in turn criticised for neglecting, once again, the social question. And they were well aware of their similarities to and differences from previous anti-autocratic political actors of Russian history, from the Decabrists to the former liberals, and then increasingly pro-socialists, Alexander Herzen and Vissarion Belinsky. Overall, Russian Narodniks can therefore be seen as a

non-progressive variant of the modern socialist matrix, and an ideological benchmark for future agrarian socialist movements of the 20th century and beyond, from South America to Asia.

The constitution of a progressive/socialist ideological matrix anticipates, rather than follows, the birth and slow electoral affirmation of the socialist and communist parties, the latter after the Russian Revolution of 1917 and the consequent partisan fragmentation within the egalitarian matrix. Indeed, the history of the socialist matrix, from an electoral point of view, essentially begins after 1900. In the last decade of the 19th century, in the few European countries where socialist or left-wing parties (such as the German SPD or the Italian Socialist party) were already present, they garnered on average about 10 percent of the national vote, then achieving around 20 percent at the beginning of the following century, with the advent of the socialist SFIO (French Section of the Workers' International) in France and the Labour Party in the United Kingdom. The different timing, speed, and extent of the electoral affirmation of the socialist parties in the various European countries typically depended on when and how much they were affected by the processes of industrialisation and urbanisation, together with the extension of suffrage, which made both possible and effective a massive social mobilisation of workers by partisan organisations.<sup>28</sup>

The socio-economically egalitarian nature of the progressive/socialist matrix makes it relatively easy to recognise the ideological agents that can be ascribed to this conceptual and empirical category. However, the relationships among the three main modern ideological matrices in their more recent historical expressions will have to be further clarified in the following chapters, in order to gain better understanding of both their persistence and their change over time. Care will be taken not to confuse the contents of an ideological matrix with the forms (more radical or moderate, purer or more hybrid, but also more or less ideological) of their possible manifestations, as well as with their intersections with more distinctly *meta-political* options (from the acceptance of liberal-constitutionalism and parliamentary democracy, to populist or authoritarian inclinations, up to the adoption of totalitarian solutions).

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28 In his remarkable study on *The political mobilization of the European left, 1860-1980*, Bartolini (2007) shows that national variations in the electoral success of the left parties also depended on the degree of the country's cultural and religious fragmentation, which hindered, when it was strongly present, the growth of the socialist forces.

To be sure, the difference between a pure, and possibly totalitarian, expression of an ideological matrix and one which, however radical it may be, recognises and respects the boundaries of a representative system is far from negligible. Quite the contrary, its consequences can be crucial of the lives of people, all the more so in a totalitarian regime in which the private sphere is annihilated by the political (and, in fact, ideological) one. But if the metapolitical is as important as the political, the reverse is also true: the most diverse policies can be conducted within the same totalitarian, or authoritarian, or populist, or representative liberal framework. And this is the specific task of this book: to reflect on the nature of the *quid faciam* of politics, that is, on which 'polar star' is mainly pursued in an ideological field by an ideological agent, regardless of whether or not it will ever be achieved.



## Chapter 6

### Ideological hybridisations

#### 6.1. The ‘interstellar’ leaning and the metapolitical goals of the Christian Social doctrine

In the European history of party politics, the Christian social tradition is often invoked as the bearer of a distinctive ideology. A Christian social doctrine has in fact guided many parties throughout contemporary history, such as the Italian Catholic *Partito Popolare* (Italian People’s Party) founded in 1919, contemporary Dutch Christian Democrats (uniting Protestants and Catholics), and the German Christian Democrats who, with Konrad Adenauer after the Second World War until Angela Merkel in the 21st century, almost continuously governed democratic parliamentary Germany. The need to define a further and specific matrix to be attributed to this European ideological tendency is, however, very doubtful. More useful will prove an analysis that points to a predominantly meta-political and politically hybrid ideology, in which a prevalent conservative element emerges from its historical genesis, which lies in the process that led Pope Leo XIII to issue the encyclical “*Rerum Novarum*” in 1891; but which also captures the directional shift towards a social-oriented message resulting from the consideration, if not the absorption, of elements derived from the progressive/socialist challenge.

After 1880, the growing strength of the socialist labour movement had prompted popes to envision an model of social organisation alternative to both the capitalist market and socialist collectivism. Only two decades earlier, at the time of the previous encyclical (“*Quanta Cura*”, 1864), Pope Leo XIII’s predecessor, Pius IX, had deprecated modern liberal and rationalist ideas, which preached “total liberty” – liberty of conscience, worship and expression of opinion – without restrictions by any ecclesiastic or civil authority; such a freedom was nothing else, from the point of view of the

Catholic Church, but a ruinous “freedom of perdition”.<sup>1</sup> While a passing reference to the “fatal mistake of Communism and Socialism” was already present in the 1864 encyclical, Leo XIII openly and immediately indicated the rationale of the encyclical of 1891 as concerning “the workers’ question”. This ratified the transition, amid the “ardent longing for novelty which has long begun to agitate the peoples”, from the political sphere to that of the “social economy”. The social question, in other words, was no longer avoidable, if not at the cost of seeing socialism flourish further.

The predominantly conservative nature of the encyclical is evident from its emphasis on the sacredness of private property and the inevitability of social inequalities. The primary purpose of the Church as regards social life was to preserve harmony among the classes and, therefore, a hierarchical social order that could provide solid support for a traditional moral order imbued with religiosity. Socialism, with its “fomenting the hatred of the rich in the poor”, the demand for the abolition of property and the principle of equal distribution, was thus denounced as a “false remedy”. While this is far from surprising, the key point with regard to the origin of the Christian social doctrine concerns what is presented as the “true remedy”, which resides in the associative form and, more generally, in the (meta-political) question of how to regulate the relationships between the state and the (private) associations of workers (such as the mutual aid societies which at that time proliferated in Italy), but also, of course, the local ecclesiastical and Catholic organisations.

The model presented for the first time in *Rerum Novarum*, and which would henceforth be the pivot of the Church’s social doctrine, therefore viewed associations as fundamental social units affirming harmonious cooperation among networked individuals and groups. It posited ‘subsidiarity’ as the guiding principle of relations between the state and civil society, whereby priority should be given to the activities of the latter, be they recreational, educational, welfarist, or of some other kind, with the state limiting itself to protecting or, at best, coordinating them whenever its direct

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1 The full text of the 1864 encyclical is available (in Italian) at <http://www.vatican.va/content/pius-ix/it/documents/encyclica-quanta-cura-8-decembris-1864.html> , that of 1891 at [http://www.vatican.va/content/leo-xiii/it/encyclicals/documents/hf\\_l-xiii\\_enc\\_15051891\\_rerum-novarum.html](http://www.vatican.va/content/leo-xiii/it/encyclicals/documents/hf_l-xiii_enc_15051891_rerum-novarum.html) .

management of the same activity is not strictly necessary.<sup>2</sup> Corporatism was a meta-political organisational model of the relations between labour and capital, within the framework of a state-led incentive for negotiations and the search for reciprocal compromises between employers and workers.<sup>3</sup>

The ‘social’ component of the Christian social tradition in politics is often associated with a pseudo-socialistic orientation in favour of the less privileged strata. It is true that, with *Rerum Novarum*, the Church took the important step not only of recognising the legitimacy of worker unions, but also of encouraging Catholics to create their own in order not to submit to the overly conflict-oriented unions monopolised by the socialist workers. Moreover, it admitted that the state had a duty “to take due care of the workers’ welfare”. A similar social move had been undertaken, as observed in Chapter 3, a few years earlier by Bismarck, whose social welfare policies also stemmed from the concern to contain socialist growth from within an ideologically conservative framework. Nevertheless, the adjective ‘social’ must be interpreted in this case as the application of the doctrine of the Catholic Church to the social realm; as such, the fundamental polar star of the social Christians should be identified in principles of social organisation such as associationism, subsidiarity, and corporatism.

Because they concern more the *quomodo* – or how – than the *quid faciam* – or what to do – of politics, however, these goals are more metapolitical than strictly political in nature. Indeed, although these organisational principles also reflect a broad conception of the social world that is hostile to the omnipotence of both the market and the state, they are nonetheless compatible not only with the Christian social parties, but also with classical liberal views – both Alexis de Tocqueville and John Stuart Mill had praised the social and economic role of civil society associations – and with socialist positions not centred on the state but being cooperative or mutualistic. And while fascism would implement a much more state-centred version of corporatism, the broader idea of a system of state-market functional

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2 The principle of subsidiarity was subsequently reiterated in the social teaching of the Church by Pius XI (1931), Johan XXIII (1961) and with several encyclicals by John Paul II in the 1980s and 1990s.

3 As reported by Wiarda (1996: 37), the group of thinkers commissioned by Leo XIII to provide a definition of corporatism referred in 1884 to “the grouping of men” gathered on the basis of their social functions and integrated into organs of the state in order to “coordinate labour and capital in matters of common interest”.

cooperation has also characterised the so called “social market economy” in Germany, as well as most other Western European countries, after the mid-20th century. Overall, the Christian social tendency can be seen not as a separate ideological matrix, but rather as a mainly metapolitical ideology, or at best the result of a certain ideological hybridisation (but with a clear prevalence of the conservative matrix). As an ‘interstellar’ tendency, in fact, it combines aspirations to maintain a certain social order, to address the social question, and to guarantee a private (but not individualistic) sphere of freedom within civil society.

Finally, it is important to note that the fundamental purpose of the Church’s ‘social teaching’ was not only to counter the rise of socialism, perceived as a largely secularised and socially disruptive ideology; the ultimate conflict of the Church was, in fact, with the nation-state. If the centralising tendencies of the modern states had already been at work for at least two centuries at that time, until recently this had been mainly due to absolute monarchies based on traditional divine legitimacy and political ‘collateralism’ with the Roman Church. Conversely, an ever-deeper cleavage between state and church was created throughout the 19th century, with the spread of liberal constitutional polities pursuing political centralisation at the expense of the Church, which even had most of its territories expropriated by the nascent Italian unitary state.<sup>4</sup> The Church’s affirmation of this model of social organisation emphasising private associations and intermediate bodies – family, labour-based corporations, mutual aid societies, religious organisations – must therefore also be seen as an attempt to safeguard an important sphere of autonomy from the aggressive growth of state institutions. In this sense, the development of this model was a counter-move to both socialist and state-national movements of this phase of political modernity.

## 6.2. Fascism, within and beyond the matrix of order

Fascism is also often considered a specific ideology. Obviously, not even a whole book would suffice to examine the various facets of fascism in its

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4 As a consequence, Pius IX proclaimed the famous motto “*Non expedit*” (i.e. it is not appropriate) – Neither elector nor elected”, with which he urged Italian Catholics to avoid any involvement in political elections. This restriction was relaxed in 1905 and only abolished in 1918.

historical and ideological complexity, and even less the interpretations of it that have been advanced in the past hundred years. The issue at stake in this section of the book is, however, more specific: to determine whether and to what extent fascism can be understood, at least in its essential features, using the matrix-centred approach developed so far. My hypothesis is that, while fascism can be certainly included separately in a descriptive and ever-expanding repertoire of political ideologies, it does not require the construction of an additional ideological matrix beyond the three that have already been examined and the complementary meta-political categories that are part of this theoretical framework. If we prefer a parsimonious explanatory model to a long descriptive repertoire, in other words, the conceptual tools at our disposal should prove sufficient.

A first necessary premise is that there are several fascisms, even considering only the original prototype, that of Italian fascism. There has been, in fact, at least a fascist *movement* before 1922; then a two-decade-long fascist regime with its internal evolutions; and, finally, a fascist “republic” populated by those who remained loyal to Mussolini (and its alliance with Hitler’s Germany) between 1943 and the end of the Second World War. Since the ideological matrix-approach focuses on the *quid faciam* of politics, however, the political conduct of the fascist regime with regard to the fundamental goals of order, freedom and equality is more important to our purposes than its cultural symbolisms and rituals. Second, the meta-political conceptions that fascism has displayed of state power and its relations with other social institutions and the people will provide the main missing elements that are necessary to reconstruct the overall picture.

I think that analysing fascism’s relation to the notion of order, in its diverse dimensions, is the key to understanding its ideological essence, even with its political contradictions and historical evolutions. In the first place, fascism represented the quintessential affirmation of a principle of political order understood as an unconditional relationship of authority and obedience. As a dictatorship, indeed, it primarily expressed the enactment of order for the sake of order itself, and thus the primacy of public order, with order being the sublimation of this relationship of command and obedience which is one of the fundamental dimensions of the political. Indeed, Mussolini’s motto “order and discipline” symbolised more than the metapolitically authoritarian means to impose a certain political ideology,

but was part of the political ideology itself. And the primacy accorded to the principle of political order – we observed this in Chapter 3 – is part of the ‘pure’ conservative ideological matrix, one that has not been hybridised by liberal constitutionalism as, for instance, in the British case. The establishment of an undisputed political order was, in fact, a major concern for all ‘anthropologically’ conservative agents who saw the prospect of chaos, social disorder, and war of everyone against everyone as the worst evil in itself.

But if the political order is itself a fundamental goal for the pure conservative ideal-type, it has been even more typically ancillary to the preservation or restoration of a certain *social* order. Indeed, a strong political order is a precondition for avoiding *chaos* not only as an evil *per se* but also, and even more so, as a sign of the disruption of a conservative social order. Of course, in the mass societies of the twentieth century the prevailing order was no longer that of the landed aristocracy, the crown, and the church. And the first and most important lever of action by fascist groups before 1922 was certainly not the defence of a traditional social order as usually understood. Quite the contrary, a cult of the deed, of the decisive act, of action for action, characterised the first fascist squads, which included veterans of the First World War, and namely those from a specific regiment called the *Arditi* (the bold ones).

This form of military-inspired engagement combined with the Italian Futurist cultural suggestions for, again, action, speed, violence, disruption, which was absorbed by the revolutionary phase of fascism and then gradually expelled from the fascist regime;<sup>5</sup> but it also reflected an inclination to political action that Mussolini himself had derived from the French revolutionary-syndicalism tendency of Georges Sorel and, much earlier, the revolutionary radicalism of August Blanqui.<sup>6</sup>

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5 Already in 1923 the journalist and writer Giuseppe Prezzolini observed that if fascism wanted to make a mark in Italy, it would now have to expel “all that remains of the futurist, that is, of undisciplined and anti-classical”; these could be good for the revolution, but were “out of place in a period of government” (Giuseppe Prezzolini, “Fascismo e futurismo”, in the newspaper *Il Secolo*, July 3rd 1923).

6 As founder of the socialist and war-interventionist newspaper *Il Popolo d'Italia* in 1914, Mussolini, who until 1918 proclaimed himself a socialist revolutionary, had a sentence from Blanqui inserted on the front page: “*Qui a du fer a du pain*” (who has iron has bread).

In short, early fascism seemed to be very far from a conservative inclination towards political and social order. Yet the main targets of the violent actions of fascist *squadristi* were the socialist political and trade union organisations, particularly in those central-northern rural regions (Emilia and Romagna) where the leagues of rural workers had been monopolised by the socialists. But even in Milan, the newly founded Italian Fasces of Combat devastated the editorial offices of the socialist newspaper *Avanti* at the end of a clash between opposite non-authorized political marches, during which armed fascist veterans killed three young socialist workers.<sup>7</sup> In the political elections of 1919, the Italian Socialist Party ranked first with 32% of the national votes. While the Italian Communist party had not yet been founded, the recent Bolshevik revolution of 1917 was a model for ‘maximalist’ socialists, and between 1919 and 1920 – the so called “*biennio rosso*” (“Two Red Years”) – a wave of strikes and factory occupations exploded, especially in the northern industrial cities of Milan and Turin. As the political sociologist Roberto Michels observed in 1925, “big capital, especially industrial and agricultural, used fascism to its advantage”. And if the fascist tendency was anti-bourgeois, as much as it was anti-parliamentary, anti-liberal, hyper-nationalist, and populist – in a word, Boulangist (see Chapter 3) – it proved to be functional, even in its nascent phase as a movement, to the preservation of a social order that reflected the interests of both industrial capitalism and the petty bourgeoisie of smaller businesses and rural farm proprietors. As Donoso Cortés theorised after the revolution of 1848, inspiring even more radical applications in political philosophers like Carl Schmitt, the dictatorial solution becomes not only legitimate, but even imperative for conservative forces faced with the threat of “the most tremendous of words”, that is, revolution.

Furthermore, it is true that fascism also encompassed modern and even modernist elements – albeit mixed with a palingenetic re-enactment of the glories of Ancient Rome – and cannot therefore be understood as an essentially reactionary response to modernity. It can, however, be interpreted through the lens of a philosophy of history which, as developed in Chapter 2, conceives fascism as a more fundamental *centripetal*

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7 All three were shot in the head. The oldest, a woman named Teresa Galli, was 19 years old.

countermovement to what its agents saw as the *centrifugal* pressures of both socialism (with its internationalism, materialism and, even more so, its class conflict) and liberalism (with its urban and essentially bourgeois individualism and rationalism).<sup>8</sup> An existing but latent demand for protection from perceived societal disintegration was thus politically activated by ideological agents in the form of both antisocialist and anti-parliamentary (that is, anti-liberal-democratic) discourses and action. The fascist mobilisation, especially between 1919 and the “March on Rome” of 1922, therefore reflected the universalistic ideological effort to appeal to national redemption (a sort of “make Italy great again”) while objectively supporting the specific social interests and values of the most destabilised strata (again, above all war veterans, small proprietors, but also unemployed persons, and some students sensitive to Futurist and nationalist appeals).

As a political regime, fascism proved anything but revolutionary, since it kept the institutions of the monarchy and the Catholic Church functioning and coexisted with them. In fact, the persistence of such important political and social institutions is probably the main factor that prevented a fascist transition from an authoritarian to a totalitarian regime.<sup>9</sup> Its ultranationalist and socially organicist rhetoric was never abandoned in the course of those twenty years: it was within the framework of a strong and united nation that society could maintain its necessary cohesion. Corporatism also served to pursue this goal of national social integration. The fascist state implemented a corporative economic system from 1925 in which a Ministry of Corporations presided over the relations between the association of Italian industrial employers and the Fascist trade unions. Economic production and labour were thus organised according to the logic of sectoral corporations, while all other forms of (non-Fascist) workers’ organisations were banned. The threat of class conflict was thus

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8 Fascist anti-materialist spiritualism was claimed by Mussolini himself in the entry “Fascism” which he wrote in 1932, in collaboration with the philosopher Giovanni Gentile, for the Italian Encyclopaedia Treccani. It must also be seen as a reaction to the cultural influence of both liberal and progressive intellectual elites, as had already been the case in the last decades of the 19<sup>th</sup> century in France, with the profound, and very contemporary, ideological polarisation between cosmopolitan progressives like Emile Zola and nationalist ultraconservatives *à la* Charles Maurras.

9 In the sense theorised by Linz (1975).

deterred with a particularly directive and top-down interpretation of the corporatist recipe of state mediation in the alleged interest of the national society as a whole.

Overall, and despite its ideological eclecticism, complexity, contradictions, opportunism and mutability, fascism can be understood mainly by using various conceptual tools that belong to the broader conservative matrix: primacy of the political order and inclination to embrace dictatorial solutions; defence of a social order fundamentally respectful of the ownership structure and traditional institutions of society; organicism and national integration; rejection of both liberal individualism and socialist collectivism. This combination of a meta-politically authoritarian and politically conservative ideological tendency, however, must be integrated with a 'social' propensity that grew increasingly visible during the 1930s, as a consequence of the market crisis of 1929 and the long economic recession that it produced. Through the giant state holding company, the Institute for Industrial Reconstruction, at first intended to provide state-funded support to failing banks and companies, the fascist state gradually came to take over more than half of the country's industrial and agricultural production (Toniolo 2013: 59). This strong form of state interventionism in the economy, which included stricter protectionist measures as the Italian involvement in World War II approached, has sometimes been juxtaposed with the other two major alternative models to a capitalist economic system during the great recession: Roosevelt's New Deal in the United States, and Soviet socialism in Russia. However, the number of nationalised companies and the extension of the public sector made the Fascist State much more similar to the latter in this respect.

This suggests that there are clear signs of a directional penchant of later fascism for the socialist matrix, mainly in its inclination to go beyond the principle of private property in industrial production and to promote, if certainly not socioeconomic equality, at least some sort of economic 'solidarity' with the national masses. Much more populist than socialist-proletarian, this social inclination of fascism was consistent with Mussolini's socialist (albeit anti-Marxist) origins and would be also found in the definition itself of German National Socialism.

### 6.3. The metapolitical and racist distinctiveness of Nazism

If Nazism is slightly less complex to analyse in its ideological terms, this is because it was, at least to a large extent, a direct derivation of fascism. In order to reconstruct the historically unique path which led to the constitution and affirmation of fascism one would probably have to go back to factors such as the revolutionary and patriotic nature of the Italian *Risorgimento*, as well as Giuseppe Mazzini's spiritualist and anti-Marxist republican patriotism; but also, as already noted, to the influence exercised by French Boulangism as national mass conservatism, and then by Georges Sorel's action-oriented revolutionary syndicalism. Moreover, the specificity of the post-war context should be considered, since it encouraged the national militarism of the *Arditi* veterans and the new wave of Italian irredentism claiming some of the former Austro-Hungarian territories; all of them (veterans and irredentists) were outraged by the promises not kept by the Treaty of Versailles of 1919, which made the Italian victory, to their eyes, a "mutilated" one. All these ingredients should then be mixed with the socialist revolutionary tradition from which Mussolini himself originated. However, when fascism, first as a movement and then as a regime, is analysed in relation to the essential elements of the ideological matrices – and thus is reduced to the lowest political denominator – its fundamental belonging to the matrix of order becomes apparent.

There were obviously many similarities between fascism and its subsequent German follower, from an ideological point of view. Although in the German ideological field, intellectual ties, at least on the right, with the French ideologues were largely limited to appreciation of Charles Maurras' *Action Française* and its ultraconservative "integral nationalism",<sup>10</sup> the French rationalist and rootless idea of 'civilisation' was a clear negative reference for the German neo-conservatives, who contrasted it with the organicist notion of *Kultur*. Indeed, the German internal ideological field was populated by a remarkable variety of intellectuals, who would later be recognised as part of the so-called "Conservative Revolution" (see Chapter 3), whose positions provided a partial but essential basis for the future emergence of

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10 Carl Schmitt, in particular, was a regular reader of *Action Française*, while Ernst Jünger claimed to have been converted to nationalism by Maurice Barrès (Breuer 1995:162).

National Socialism. But as in early fascism a movement of eclectic antiliberal and antisocialist intellectuals, such as Gabriele D'Annunzio or Filippo Tommaso Marinetti, coexisted with war veterans, on the one hand and with socialist revolutionaries on the other, a not fundamentally dissimilar amalgam characterised, at different phases, the early history of the National-Socialist party.

Once again, despite the considerable historical differences between the German and the Italian cases, their lowest common ideological denominator was evident in the search for a new political order based on an organicist view of national society and inspired by an ideal past not contaminated with liberal modernity and parliamentary democracy. And, as noted above, in both cases, this ideological inclination firmly rooted in the matrix of order slightly leaned towards elements drawn from the socialist (and certainly not the liberal) matrix. But if neither fascism nor nazism can be defined by means of the conservative matrix alone, this is more because they need to be integrated with ideologically metapolitical elements than for their hybridisations with the socialist matrix.

Firstly, a radical mode and a revolutionary orientation characterised the interpretation of the political matrix by both movements, so that the *quid* of their politics must be accompanied by these specifiers of intensity ('radical') and method ('revolutionary'), which are almost entirely independent of the type of politics and policies pursued. Second, they both gave birth to dictatorial regimes through the destruction of the rule of law and the principle of representative government (liberal constitutionalism), thus choosing a meta-political option which, again, is relatively independent of the nature of the ideological matrix (in fact, the same political *quid* may also be advocated, if not implemented, by parties or groups in a liberal democracy). Third, they also instituted totalitarian or quasi-totalitarian (in the Italian case) political systems in which the ideology of the party was translated into the ideology of the state and came to permeate both the public and private spheres of social life (and although in no matrix is this a necessary outcome, it makes it possible to emphasise the essentially ideological nature of the 'pure' type). Fourth, they both contained distinctive ideological elements that can be derived from a particular matrix, without being however constitutive of it.

Indeed, there was a distinctive ideological element in Nazism – racism – which originated, both historically and 'logically', within the matrix of order,

but without being one of its core elements. Modern racial theories were in fact influentially developed by Arthur De Gobineau, a reactionary-conservative French aristocrat *par excellence* who – shocked by the popular and, in several cases, proletarian Revolution of 1848 – sought to legitimate in pseudoscientific terms his belief in the racial inferiority of the mob. It was in his *Essai sur l'inégalité des races humaines* (“An Essay on the Inequality of the Human Races”), two volumes published between 1853 and 1855, that Hitler found – imported and popularised in German culture by Richard Wagner – a first theorisation of the racial superiority of the Aryans. But while the German Conservative Revolution of the 1920s was also tainted by racist thinking (Breuer 1995), this would be far from sufficient to define biological racism as a constitutive element of the conservative matrix.

Racism, however, can be considered as a more or less directly ‘derivative’ element of this matrix depending on whether it is based on biological theories, as in de Gobineau, or whether it expresses xenophobia for any other cultural or instrumental reason, as for instance in Maurice Barrès’ investives against immigrants in France in the 1880s; or whether it consists of the pro-slavery positions of the conservative sugar planters and cotton farmers of the Southern Confederate States at the time of the US Civil War in the 1860s. In fact, a common thread runs through these remarkably different historical cases: the representation of the ‘out-group’ as a threat to a social order that reflects the interests of a dominant group (the French aristocrats – of Frankish blood – for de Gobineau; the landowners of Louisiana and the Mississippi delta in the US Civil War; native French workers for Barrès). In the conservatives’ organicist view of society, as well as in their pessimistic social anthropology, the ‘out-group’, and namely the ‘stranger’ – whether it takes an individual or collective form – is perceived as threatening the unity, harmony and inherent order of the community. Therefore, a fundamentally negative disposition towards immigrants and national minorities can be seen as an important derivative element of the conservative matrix of order. In the case of the specifically biological and anti-Semitic racism of Nazism, however, the derivation from this matrix is certainly weaker and further away from its core elements.

A further step is thus taken in the theoretical definition of an ideological matrix-approach. If racism is more a ‘derivative’ element of the matrix of order than a ‘constitutive’ element of it, other elements can be defined

as ‘transcending’ any matrix: for instance, the methodological option of a revolution or coup d’état and the metapolitical choice of dictatorship transcend the ideological nature of a matrix, since they are not necessary for its deployment. It is, therefore, the combination of constitutive, derivative and transcendent elements that renders the idiographic specificity of any historical manifestation of the matrices. And the risk of focusing excessively on its peculiar and distinctive element – as is biological racism for Nazism – is that of failing to recognise the fundamental matrix to which a historical manifestation belongs, when that element is not constitutive, but derivative or, even worse, transcendent in regard to the matrix itself. A populist party whose fundamental struggle is against the political establishment, for instance, will be characterised by a distinctive metapolitical element that transcends the three ideological matrices; it is however more to the egalitarian matrix or, on the contrary, to the matrix of order that its effective positions on the *quid* of politics will probably bring it.

What kind of social order is being promoted? Which social groups benefit from a regime’s economic policies? And are the rights to individual liberty respected, extended, limited, or withdrawn? It is around these fundamental questions that the political *quid* of an ideology is revealed.

In the case of National Socialism, the establishment of a nationalist and racist order was accompanied by a contradictory positioning with respect to capitalism, private property, the role of the state in the economy, relations with large companies, the middle class, and the working class. While the initial rhetoric of the Nazi party was both anti-communist and anti-capitalist, German industrialists and business groups, whose affinities were ‘naturally’ stronger with the political conservative forces in power, began to support and finance Hitler’s party, especially from 1933 onwards. Shortly after his rise to power, Hitler sought to conciliate the German conservative institutions, from President Von Hindenburg to the army; and it was under their pressure, as well as that of the conservative vice-chancellor and the business leaders, that he decided to act against Ernst Röhm’s national militia of brownshirts, perceived by conservative forces as the most dangerous revolutionary and socialistic component of Nazism. The “Night of the Long Knives” of 1934 marked the virtual end of this component, but also the end of the conservatives’ hope to control Hitler and use his leadership to their advantage.

However, the fundamental structure of property – from landed to industry ownership – of the German society and economy were not affected by the Nazi regime, which did not pursue policies of nationalisation as did the fascist regime and, on the contrary, favoured the partial privatisation of public services. Although it obviously banned the socialist workers' unions, the regime proved very far from endorsing free market capitalism. In order to deal with the Great Depression and severe unemployment, it relied on strong state interventionism in various forms, from protectionism to state regulation of the economy. It did so by urging private industries to pursue the priorities set by the regime; but also through ambitious public works financed by public spending, such as rearmament and the construction of the superhighway network (which had already been conceived by the previous conservative government). It also enacted a programme of leisure-time activities for workers and subsidies for their vacations (but the conservative Wilhelmine Germany was already the first country in the world to have introduced, in 1905, legislation on annual leave, that is, on paid holidays for workers and employees).

Overall, therefore, the Nazi socio-economic policies were fundamentally consistent with a conservative and order-oriented approach, in times of national mass politics, intended to conciliate the interests of big business, on the one hand, and the national integration of the masses on the other. And if we also consider the electoral bases of support for the National Socialist Party, we should keep in mind the assumption of classical political sociology – from Karl Marx to Seymour Martin Lipset – that the lower-middle class of small self-employed proprietors, including small manufacturers, small merchants or shopkeepers, artisans, and farmers, usually have conservative-reactionary dispositions. Belonging to neither the upper bourgeoisie nor the working class (nor, in fact, to the new middle class of white-collar employees), these socio-occupational strata have always tended to be overly concerned about the protection of their characteristically unstable social status, constantly caught between the hope of socio-economic advancement and the fear of a downward trajectory.<sup>11</sup> Between 1928 and

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11 As Marx and Engels famously wrote in the *Manifesto* of the Communist party (1848), “all these [strata of the lower middle class] fight against the bourgeoisie, to save from extinction their existence as fractions of the middle class. They are therefore not revolutionary, but conservative. Nay more, they are reactionary, for they try to roll back the wheel of history”.

1933, the rise of the National Socialist Party in successive national elections showed that initial support mainly by the lower-middle class extended to a more nationalised electoral consensus, which also drew on the working class and the upper middle classes. In fact, support for Hitler's party rose from 2.6% of the national vote in 1928, to 18.3% in 1930, to more than 30% in the two 1932 elections, to nearly 44% in the 1933 election, which was held a month after Hitler had become Chancellor. During this period, only the Communist and Catholic parties maintained or increased their national score, while heavy electoral losses hit all other parties – from Conservatives, to Liberals, to Social-Democrats.<sup>12</sup>

Finally, the issue of individual liberties and freedom rights under Nazi Germany is almost tautological. But while all major civil and political rights were suppressed and all forms of political and social opposition repressed in the totalitarian State, active discrimination policies targeted minority groups – defined by the Nazis as out-groups with respect to the Aryan national *Volksgemeinschaft* (“people’s community”) – such as, notoriously, Jews, but also Roma, as well as a less ascriptive social group such as homosexuals. The social position of women was also clearly defined in terms of a traditional morality reflecting a patriarchal social structure in which gender roles were differentiated along the cleavage of the public/private sphere. Women tended to be confined to the private spheres of “*Kinder, Küche, Kirche*” (Children, Kitchen, Church), according to a motto that was not Hitlerian, but derived from the previous German Empire. In addition, abortion was again criminalised (except for cases that violated eugenics) after the legislative relaxation of the Weimar Republic, and contraception was discouraged (while policies that encouraged birth and fertility were strongly pursued by Fascist Italy).

The *quid* of politics as regards minority or socially dominated groups is one of the fundamental components of political ideologies. When the repudiation of rights does not affect the whole population – and hence each citizen, individually – but rather the members of a social group or category, an important element related to collective social identities enters

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12 In particular, support for the SPD fell from 29.8% to 18.3%, that for the Conservative party from 14.2% to 8%, while the middle-classes parties (both the right and left Liberals, as well as the small business parties) virtually disappeared. More general trends are based on the analyses by Pratt (1948) – whose data were re-elaborated in a useful table by Lipset (1960: 143) – Childers (1983), Eley (2003).

the ideological field. I hypothesise that since the repudiation of individual rights reflects a typically anti-liberal ideology (as well as the meta-politically anti-liberal constitutional ideology of the totalitarian state), the repudiation of the rights of a minority group can be seen as the conceptual opposite of a liberal-progressive (hybridised) ideological orientation, which aims to extend certain civil rights to these socially disadvantaged or discriminated groups. While a more progressive or more liberal framing of the same ideological orientation will also depend on the more or less dominated position of a given group on the socioeconomic ladder, we can anticipate that the ideological positions most antithetic not only to Nazism but also, and much more generally, to hostility to minority out-groups are, metapolitically, constitutional liberalism and, politically, liberal-progressivism (see Chapter 8).

Franco's regime in Spain (1936-1975) seems to come much closer than fascism and nazism to a 20th century 'pure' conservative type combined with a dictatorial/authoritarian metapolitical system. Especially when it emancipated itself, at least in part, from its fascist component (the Falangist movement) after 1945,<sup>13</sup> the regime of General Francisco Franco was an almost exemplary ideological combination of conservative nationalism, militarism, monarchism, corporatism, Roman Catholicism, and moral traditionalism. The army, the Church, the crown (which was formally reintroduced in 1947, even in the absence of a designated monarch), businessmen and landowners were the regime's main support groups and institutions. With the exception of the monarchical element, its similarities were closer to Salazar's *Estado novo* in Portugal, but also to the "Caribbean dictatorships" of Fulgencio Batista in Cuba, Rafael Trujillo in the Dominican Republic and Anastasio Somoza in Nicaragua, than to Italian Fascism: what these national conservative authoritarian regimes had in common was a military-based political order that aimed to preserve a social order of which the main beneficiaries were the large landowners (sugar and coffee planters in the Latin American cases).

If Francoism's anti-socialism had been constitutive of its political identity since the civil war of 1936, its anti-liberalism was equally adamant and resulted in a wide range of practices such as cultural censorship, the

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13 The regime's "serious efforts" after 1945 to sever its links with a fascist past are analysed by Preston (2003).

confinement of women to household roles, prohibition of divorce, contraception and abortion, religious control over school education, cancellation of civil marriages, and many more. This ideological model dominated at least until its relative economic and cultural liberalisation in the 1960s, after Spain joined the United Nations (in 1955) and yielded to pressures from technocrats newly appointed to government positions (1957) and from the International Monetary Fund in favour of a free-market economy (1959). A share of cultural and, much more so, economic liberalism thus hybridised the fundamentally conservative ideological matrix in which Franco's politics was inscribed, even if always within an authoritarian metapolitical framework.

While the official ideological polar star was still order – the preservation of a certain national, traditional and religious order – a liberal trend made its way into Spanish society during the 1960s. This was not, however, the relatively successful result of a battle of ideas in favour of economic and cultural liberties fought by liberal ideological minorities; rather, it reflected the objective openings of a regime which was increasingly inserted into a post-war bipolar international system, and which was fiercely opposed to its communist pole. Franco's Spain's ties with the aforementioned international institutions, but also with the United States and the European Community, as well as massive foreign investment and rapid economic growth, generated a process of societal and, therefore, ideological normalisation of the country and its regime. It is no coincidence that, after Franco's death in 1975 and the transition to democracy via the establishment of a constitutional monarchy by King Juan Carlos, Spain experienced a particularly rapid secularisation and modernisation of society, especially under the leadership of Prime Minister Felipe González from 1982.

#### **6.4. Applying the ideological-matrix approach to contemporary politics**

The cases of the Christian-Social tradition, fascism, Nazism and Francoism have shown roughly how the ideological matrix-approach developed in the previous chapters can be applied to the analysis of single historical cases. A first step is the isolation of a “historical sequence-of-interest” (Simmel, 1916) in order to analytically separate the empirical

manifestations of ideologies on how to organise society from those on how to organise politics. I have called the former ‘political’ and the latter ‘metapolitical’. Much of the modern ideological struggle has been fought, and continues to be fought, basically on the ‘*quis*’ (who) rather than the *quid* (what) of politics. Who should primarily exercise political power is the great, and always unresolved, metapolitical issue. From the constitutional liberals of the 18th century to the republicans and democrats of the 19th century, and from the authoritarians and totalitarians of the 20th century to the populists of the 21st century, the tentative responses were, respectively: a representative government within a balance-of-power institutional framework (and not, typically, an absolute monarchy); a president elected by universal suffrage (and not a king limited only by an elite parliament); a dictatorial leader, or one who embodies the party and/or the nation (and not a liberal and pluralistic democracy); a more directly sovereign people, with fewer institutional intermediaries (and not, once again, a liberal and parliamentary democracy denounced as ‘corrupt’, self-referential and detached from people).

It is the source of many errors and misunderstandings to confuse this metapolitical level, which pertains to the concerted rules of the political game, with the properly political struggle over how to shape social, economic and cultural life. The most diverse types of society can be conceived under the same institutional system, and this remains partially true even in the extreme case of totalitarian systems: while the totalitarian metapolitical element necessarily affects people’s lives in a profoundly illiberal direction, the social groups and institutions that benefited and, above all, lost the most in Nazi Germany and Soviet Russia were fundamentally different. But the counter-proof is also true, as the same policies can be conducted by the most different institutional systems: a free-market economy could be pursued by General Pinochet’s authoritarian Chile, by president Reagan’s liberal democratic United States and by other mixed institutional systems such as those of 21st century South Asian countries. And even being a monarchist and a republican respectively, as in the cases of Charles Maurras and Maurice Barrès in France at the crossroads between the 19th and 20th centuries, can be overshadowed by a common ultraconservative nationalist ideological positioning. Furthermore, the fact of advocating a federalist, regionalist or nationalist configuration of state powers suggests nothing,

in principle, about the kind of society that the federalist, regionalist or nationalist forces have in mind. The political articulations of these metapolitical doctrines are historically constituted and cannot be deduced logically, *a priori*.

The same is true – this we have also noted – in relation to stylistic and ‘methodological’ approaches to politics. In this case, in fact, exchanging the style or method of a movement for its ideology would be a double error: revolutionaries, for example, are always united in the struggle against the established order; however, they will split over the form to be given to both the new institutions and the new society. This is why the cult of violence and the myth of direct action transcend the nature of a political ideology: they characterised both a part of revolutionary socialists on the one hand, and the early fascists and Nazis on the other. Indeed, it can be argued that this stylistic and methodological element was the most distinctive (non-political) feature of some of these groups, which withdrew their voluntaristic and enthusiastic support for the official representatives of the related political ideology when the latter entered the institutions and disavowed the old methods.<sup>14</sup> But this also seems to be the vocation of several populist forces of the contemporary age, when their *raison d’être* is revealed to be a set of symbolic reforms that reduce the ‘privileges’ and power of the parliament, much more than the anti-immigrant or pro-welfare (or both) political ideological orientation.

The fact that the distinctive essence of a group’s ideology is sometimes more metapolitical than political – as in the case of some revolutionary and action-oriented syndicalists – also gives rise, when not properly understood, to the trivial observation that “extremes overlap”. And if violent protests can occur, even in the 2020s, in cases where ‘left’ and ‘right’ extremists are hardly distinguishable – for instance in street protests against state measures to contain the Covid-19 epidemic – this does not fill the ideological abyss between these two extremisms in their fundamental political visions. Therefore, prefixes of intensity such as ‘radical’ and ‘moderate’ must generally accompany, rather than replace, the reference to a political ideological matrix. The reformist and maximalist socialists did not fundamentally differ

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14 This is what happened to Mussolini in 1921, when he agreed to present the Fascist party in coalition with the classical liberals in the legislative election, so as to gain more seats in parliament.

in the polar star that they pursued – socioeconomic equality – but in the strategy to achieve it. This entailed different dispositions and orientations regarding the technique of compromise, the parliamentary institution, and the means of violence. Both the maximalists and the reformists belonged, however, to the matrix that we have termed ‘progressive/socialist’.

Likewise, there was a considerable metapolitical, methodological, and stylistic difference between German national conservatives (leaving aside the “revolutionary conservatives”) and a sector of the Nazi party élite in the early 1930s, but the contents of their political goals were, when reduced to their minimum denominator, far less dissimilar. When the most extreme examples, such as those referring to the Nazi deviation, are abandoned, much of the fundamental difference between moderate and radical parties belonging to the matrix of order are mainly a matter of degree. Even the distance between British conservatives under Boris Johnson’s leadership and hard-line Brexiters (former UKIP voters) tended to vanish in the late 2010s, as we shall see, when core positions on social order, minority rights, and socioeconomic equality are considered. And the same fundamental predilection for a matrix of order would also characterise, in many ways, traditional conservatives and radical right parties and voters in countries as diverse as Austria, France, Italy, and the Netherlands.

The processes of ideological radicalisation and partisan fragmentation have often intertwined in the history of mass politics: new, more radical political forces have arisen from forces that have lost their polar star – so those self-exiled from the ‘mainstream’ party claim. This has happened countless times in the history of the socialist parties, from which the European communist parties were also born (although in this case more due to strategic differences of a metapolitical and methodological nature rather than mere ‘purity’ in the pursuit of the ideological polar star). Especially in the more polarised and fragmented party systems, such as those of France and Italy, a long history of splits and re-foundations has accompanied the lives of the parties embedded in this matrix. In other cases, the opposite desire for some ideological distancing from the original polar star has led – always in conjunction with contingent political situations – to the rise of more moderate parties, such as the Italian Democratic Socialist Party (PSDI) in 1947 and the British Social Democratic Party (SDP) in 1981.

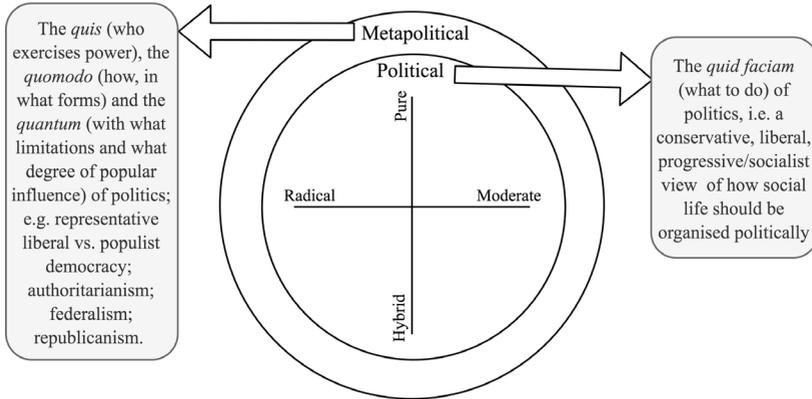


Figure 6.1. Political and metapolitical ideologies

Political ideologies should not be confused with metapolitical divisions on the organisation of politics itself. Both political and metapolitical ideologies can manifest themselves as more or less ‘pure’ or ‘hybrid’ types and in more radical or moderate forms

A return to the search for the original polar star lost by the establishment parties has also characterised the birth of contemporary parties belonging to the liberal matrix, such as the Italian Radical Party (founded in 1955 after a split from the Italian Liberal Party) and the Dutch D66 (founded in 1966 as a consequence of the liberal-conservative positioning of the mainstream liberal party – VVD). But the liberal matrix has exerted much of its impact – this is a thesis of this book – through hybridisation rather than radicalisation. Its strength consists in colonising the other two matrices and transforming conservatism into liberal-conservatism and progressivism/socialism into liberal-progressivism. We will return to this point shortly, but the necessary premise is that the rights advocated by contemporary liberals transcend material subsistence, such as in the case of (conservative) security rights and (progressive/socialist) socioeconomic rights. On the contrary, these rights tend to coincide with post-material rights that often cannot be experienced directly by their supporters: the rights of suspects or convicts; the rights of ethnic minorities; the rights of consumers, maybe including

drug users; the rights of cyclists; and rights relating to sexuality, bioethics, information; but also the rights linked to the free international circulation of persons, goods and capital.

Defending these kinds of rights, which basically refer to the sphere of civil liberties, does not allow, however, for mass electoral support. Having these liberties as one's polar star requires, in fact, a certain position in the social space, particularly in terms of cultural capital and the existential security provided by education and income or heritage (because otherwise more material concerns tend to become a priority). As a result, few political entrepreneurs would invest in founding a 'pure' liberal party because it would probably yield scant electoral returns, except in societies that have achieved a notable level of wealth and education (as is the case today in large Western urban centres); or unless the contingent political situation allows an otherwise difficult electoral success (as in the case of the French Presidential election of 2017 won by Emmanuel Macron despite a fundamentally liberal ideological positioning).<sup>15</sup>

As for the parties placed in the matrix of order, they are no exception in the logic of ideological radicalisation that also characterises parties from the egalitarian matrix. Relatively recent examples following the earlier hybridisation or moderation of mainstream conservative forces are the birth of the UK Independence Party in 1992 (its co-founder and future leader Nigel Farage left the Conservative Party in the same year in opposition to the Maastricht European Treaty); the Party for Freedom in the Netherlands (PVV), founded in 2006 by Geert Wilders after leaving the VVD party against the prospect of Turkey joining the European Union; and Vox in Spain, a nationalist and socially ultraconservative party launched in 2015 following a split from the traditional conservative Partido Popular (People's Party). Clearly, these radical parties are parties of order (in the expression's various senses of national order, political order, public order, as well as the acceptance of a fundamentally inegalitarian socioeconomic order). And they are parties of order to a greater extent than the mainstream conservative parties of the contemporary age, so hybridised with the liberal matrix. But they also have a distinctive ideological *quid* that usually has to do with

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15 Macron's party, La République en Marche, also emerges from the data of the Chapel Hill 2019 expert survey as a political force with strong urban bases, oriented towards the elites, in favour of market deregulation and anti-protectionist in international trade.

the European Union and migrants – two issues with a derivative proximity to the logic of the liberal matrix – in relation to which the rejection of any liberal hybridisation is emphasised.

On a practical level, as noted, it is difficult to distinguish between ‘pure’ and ‘radical’ ideological types, as it is to disentangle hybrid from moderate ones. We have defined as ‘pure’ the ideological type that pursues the polar star of its own matrix while ignoring those of the other matrices. Let us take the macro-level example of a political regime. The pure conservative type will pursue a political, social, and moral order of a traditional kind with no acknowledgement of either freedom rights or socioeconomic equality; the pure progressive/socialist type will aim to establish socioeconomic equality without recognising the legitimacy of individual liberties and traditional order; the pure liberal type will chase the polar star of freedom in all its (civil, cultural, economic) expressions to the detriment of both traditional order and socioeconomic equality. Almost by definition, pure ideal-types do not exist in the real world. However, real types can approximate a pure type more or less closely.

To give some concrete examples, Socialist Cuba has since the 1959 Revolution represented a model that advocates of the progressive/socialist matrix have looked upon with a certain sense of identification – they typically mention the decent standard of living made possible for all Cuba’s inhabitants, and the remarkable quality of its health and education systems, especially compared to neighbouring Caribbean and central American countries. Admiration for this model, however, has diminished along with the gradual hybridisation of Western socialists with the liberal matrix, which has come to define the disregard of civil liberties in Cuba as unacceptable (the imprisonment of homosexuals being a clear example), as well as its authoritarian metapolitical system. We have already mentioned Franco’s Spain – especially with the downsizing of its fascist component after World War II and before its relative cultural and economic liberalisation in the 1960s – as a good approximation of a pure conservative type, one also combined with an authoritarian metapolitical solution. The leader, the nation, the army, the big landed and business owners, protectionism, the Church, the monarchical symbol – all these elements contributed to the preservation of *that kind* of political, social and moral order, with very little credit for both individual liberties and socioeconomic equalities.

As regards the approximation of a pure liberal type, one should search for a combination of free market, civil liberties and income inequalities, in the absence of a strong nationalist order and pervasive religious institutions. New Zealand is among the top countries in the world for individual freedom, according to empirical indicators such as Freedom House's index of civil liberties or the Human Freedom Index;<sup>16</sup> New Zealand also ranks very high in terms of economic freedom (third in the world, after Singapore and Hong Kong, in both the 2019 Economic Freedom of the World Index and the 2020 Index of Economic Freedom).<sup>17</sup> Furthermore, it is one of the most secularised countries in the world (nearly half of its population stated that they had no religion in the 2018 national census). The socio-economic inequalities detected by the income distribution indicators are, however, fairly average by the standards of advanced democracies (considering both the Gini coefficients and the ratios between the top 20% and the bottom 20% income levels).<sup>18</sup> In other words, New Zealand, whose political trajectory will be examined in more detail in section 7.2, is not sufficiently inegalitarian in socioeconomic terms to come close to a 'pure' type of liberal ideological realisation which values individual liberties at the expense of order and equality.

With regard to income inequalities, the United States ranks first among Western democracies,<sup>19</sup> clearly superior to the United Kingdom, which ranks first in turn among Western European countries. However, the United States is somewhat less 'virtuous' in terms of both civil liberties and economic freedom; moreover, the combination of its national, military, and religious components makes it symbolically closer to the matrix of order in this respect. New Zealand's civil liberties in conjunction with US income inequalities would, in fact, provide a good approximation of the liberal ideal type at the macro level. It is significant, moreover, that it

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16 These indexes are co-developed by classical liberal/libertarian foundations such as the Cato Institute, the Fraser Institute, and the Liberales Institut.

17 The former is published by the Fraser Institute, the latter by the Heritage Foundation and The Wall Street Journal.

18 Data source: <https://stats.oecd.org/>.

19 From the most recent data available, the Gini coefficient for the United States was 0.390 and the ratio between the top 20% and the bottom 20% was 8.4 in 2017. For comparison, the scores for Finland and Norway, which register the least inegalitarian results, did not exceed 0.266 and 4.0 respectively, while they were 0.357 and 6.3 for the United Kingdom.

is in the 'Anglosphere' – Australia and Canada also present relatively satisfactory profiles from an ideologically liberal point of view – that the main manifestations of John Locke and Adam Smith's matrix of liberties are primarily to be found, three centuries later. As for the Netherlands, another historical cradle of liberalism, they rank high for both economic freedom and civil liberties, but they are also among the more egalitarian countries socioeconomically, also given the extensiveness of their welfare states until recently. Overall, more qualitative analyses should certainly complement these approximate indicators of the more complex concepts with which we are concerned.

Of course, the usefulness of 'pure' types is for the most part heuristic. Indeed, they allow, just like Weberian ideal types, for abstract generalisations that isolate some key conceptual properties and make them more salient. If the only goal is to preserve or restore a certain order – even at the expenses of other rival goals such as freedom or equality – a dictatorial solution is likely to prevail. And the same goes for the goal of achieving socioeconomic equality. In fact, one of the clarifying advantages of an ideological matrix-approach consists in revealing that both conservative and progressive/socialist matrices tend to embrace, in their pure states (and therefore in their ultimate essence), illiberal metapolitical options. By contrast, the liberal matrix would tend, in its pure type, to 'small government', to be practically interpreted as minimal government intervention both in the economy and in the sphere of private liberties. But it should be clear that just as a purely 'liberal' society has never existed historically (due to the presence of mercantilist measures or restrictions on civil liberties, or both), so an ideologically liberal orientation is one that pursues the polar star of freedom without ever necessarily reaching it. And in all cases, the heuristic advantage of having a pure type as a theoretical benchmark remains that of identifying the direction – or directional shift – undertaken by a given ideological agent towards a different ideological matrix, even if only with a single political stance or policy decision, and therefore without necessarily giving rise to a more general ideological hybrid.

It is thus on a practical level that the difference between the pure and radical expressions of an ideological matrix tends to shrink. A political leader, movement or party that pursues a given ideological polar star with some determination and selective emphasis – that is, visibly more that it pursues

other ultimate goals – can be considered at the same time a more radical and purer ideological expression of that given matrix. If radicalism (versus moderation) taps into the dimension of intensity, while purity (versus hybridisation) refers more to the willingness to sacrifice the other main polar stars of politics, the former is close to ideological extremism, the latter to ideological coherence. In practical terms, once again, the more radical ideological expressions may also tend to be less hybrid, and the more hybrid ones less radical; but this tendency is far from being a historical law. The resulting pattern, in fact, depends very much on the dynamic relationship between historical context and ideological cycle, which brings us back to that dialectic between centripetal and centrifugal movements and counter-movements that we identified in Chapter 2 as a fundamental mechanism of historicity in the modern age.

## Chapter 7

### Contemporary ideological directions

#### 7.1. The strategic ‘thirdness’ of liberalism in the mechanisms of historicity

In the myopic left/right scheme there is a conceptual victim – liberalism – whose removal prevents its user from grasping virtually everything that happens, and has historically happened, in the ideological field. Unless classical liberalism is simply juxtaposed with the political ‘right’ – but here the remedy would be worse than the disease, because the entire matrix of order would remain excluded, or mistakenly relegated to the far right – a dichotomous scheme prevents one from seeing how much the modern liberal matrix has been and continues to be a fundamental driver of the ongoing conflict in the ideological field. And if so, the reason is that liberalism – as the matrix of the rights of individual liberties – tends to correspond to the centrifugal movement of modernity, which in turn triggers the centripetal counter-movements towards order or equality.

While it is the matrix of order that responded, with the Restoration of 1815, to the liberal thrust of the Enlightenment and the French Revolution (namely with the Declaration of the Rights of Man and of the Citizen of 1789), the egalitarian matrix developed and exploded in France in 1848 as a response not only to the liberals in power since the 1830s, but more fundamentally to the consequences that the economic system advocated by the liberals had on the social fabric. And when the European ideological field became dominated by the centripetal push of social protection in the 1880s and 1890s, this can once again be interpreted as a countermove to the effects of the “long recession” that had begun in the 1870s. The so-called “panic of 1873” in the United States is known as the first international financial crisis. It hit Western stock exchanges first, and then caused deflation and weak economic growth for the next ten to twenty years, all this in the

context of a still largely unregulated industrial modernity:<sup>1</sup> from Bismarck's Germany, to Victorian Britain, to the Catholic Church (encyclical *Rerum Novarum*), the need for a protective mechanism ensured by the state or by society as an organic body imposed itself to curb the social consequences of an economic crisis driven by monetary mechanisms.<sup>2</sup>

Conservatism showed its social face in those decades, not only because the cohesion of society had to be defended against the centrifugal effects of unregulated capitalism, but also because the socialist alternative advocated by the workers' movement and the first socialist parties was an opposite and growing threat to the social order. But the same decades also saw further technological innovation (the expansion of telegraph lines and railroads, followed by the invention of the telephone and electricity) which resulted in a wave of globalisation accompanied by an unprecedented movement of people and goods. The peculiar mix of an enduring economic recession (monetary contraction and industrial slowdown), in the context of a second industrial revolution, with accelerated globalisation, which in turn produced mass emigration from poorly industrialised European countries, constituted for the first time a 'hypermodern' historical situation whose essential features resembled, in many respects, future ones (from the Great Depression of the 1930s to the new economic depression from 2008 to the 2010s).

And it was in France, where the economic crisis lasted the longest – also due to the reparations still to be paid to Germany long after the 1870 Franco-Prussian War – that the ideological field saw the emergence of 'hypermodern' political forces rooted in the matrix of order: from the anti-migrant nativism of Maurice Barrès, to the nationalist populism of Georges Ernest Boulanger, to the ultraconservative nationalism of Charles Maurras. Henceforth, two rival responses to the centrifugal thrusts of modernity would be available for activation and competition in the ideological market

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1 The United States implemented a restrictive monetary policy to return to the gold standard, which it had abandoned during the Civil War. This rapidly caused deflation and economic stagnation until the explosion of financial panic and its consequent repercussions on industrial production, which in the 1873-1890 period grew more slowly than in the previous and following decades in Germany, the United Kingdom, the United States and France (Tylecote 1993: 12).

2 According to Polanyi (1944: 153), the main European countries "passed through a period of free trade and laissez-faire, followed by a period of antiliberal legislation in regard to public health, factory conditions, municipal trading, social insurance, shipping subsidies, public utilities, trade associations, and so on".

regarding the direction to be given to the centripetal countermove<sup>3</sup>: one progressive/socialist in the direction of more socioeconomic equality, and one fundamentally conservative aimed at restoring order within the nation. And the radicalised centrifugal thrusts of contemporary hypermodernity are prone to elicit radicalised order- or equality-oriented counter-movements, according to the idea of a radicalisation of the double movement of modernity that was discussed in Chapter 2.

Furthermore, it should not be forgotten that it was, again, from a short circuit of financial capitalism – the Wall Street Crash of 1929, following the crash of the London Stock Exchange – that a long economic recession originated, causing inflation and mass unemployment. The multiplication of authoritarian, pseudo-fascist and politically ultra-conservative governments in Europe (from Austria to Finland, from Bulgaria to Greece, from Spain to Portugal) must be seen as a consequence of this crisis, which can be objectively held responsible for the exacerbation of the historical conditions in which National Socialism also came to power. Of course, the radical and totalitarian socialist solution of the Soviet Union, with its Five-Year Plans, was also available in the ideological field of most European countries – and it also functioned as a deterrent that facilitated the success of the alternative option founded on the matrix of order. Where parties of the progressive/socialist matrix came to power, as in Britain and France, they were soon dismissed by the imperatives (maintaining a stable currency and a sound budget) of economic liberalism that had become common sense in the 1920s, when inflation was endemic in several European countries. These imperatives were only strengthened in the context of a ‘monetarised’ international system destabilised by the United States having abandoned the gold standard to finance the New Deal. President Roosevelt’s response to the crisis, with its monumental state-funded public works programme accompanied by financial market regulation and subsidies for the unemployed and the poor, was objectively following the progressive matrix’s imperative of reducing socioeconomic inequalities.

The catastrophe of the Second World War imposed a generalised effort in the direction of the egalitarian polar star. This ‘levelling’ mechanism has

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3 The fundamentally centripetal – because socially protective – direction of these counter-moves obviously does not prevent them from being politically divisive, passing through social conflict or being portrayed as disruptive by their ideological opponents. See also section 5.2.

been acknowledged as typical in post-disaster contexts throughout history (Scheidel 2018). The First World War had already provided the opportunity for the introduction of strongly progressive taxation on income and assets in the main Western countries, less for ideological reasons than to finance the military enterprise to be conducted. After 1945, the goal became social and economic rather than military. The alternative solution resting on a metapolitically authoritarian interpretation of the matrix of order appeared clearly discredited, at least in the Western world, by the defeats of Germany, Italy and Japan, with their respective models. The maximum rates of income tax and inheritance tax had continued to rise in Britain and the United States during the New Deal, and they peaked during the war.<sup>4</sup>

Not only was this extremely progressive system of taxation maintained after 1945; it was also accompanied by an aggressive policy of nationalisation and the establishment of a National Health System by the new Labour government in Britain,<sup>5</sup> and by a “Fair Deal” programme launched by Harry Truman’s Democratic administration in the United States, with a policy of investments in health, education and employment, despite the opposition of the Republican majority in Congress. Truman’s Republican successor in the 1950s, President Eisenhower, however, maintained the government’s effort in favour of public works, social security, and progressive taxation. That the post-war context required state-driven centripetal efforts of public investments, social protection, and inequality reduction was also clear in the case of France, where General De Gaulle, who would be the politically rather conservative founder of the French Fifth Republic in 1958, agreed to carry out, as chairman of the Provisional Government between 1944 and

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4 This trend is clearly shown by Piketty (2019: 525, graphs 10.11 and 10.12), whose approach, however, focuses on direct taxation to the detriment of other elements of the overall tax structure (such as value added tax on consumption), which can also reveal a more liberal or progressive/socialist ideological orientation. While not ideal—typically liberal, for instance, high indirect taxation may serve the dual purpose of being *de facto* inequalitarian – it hits higher incomes proportionally less than lower ones – and amplifying the visibility of the state’s tax voracity in the eyes of consumers.

5 For the British Marxist Ralph Miliband, the Labour Party’s efforts still did not go far enough in the egalitarian direction, because “conservative and capitalist interests were not touched” and the promised “new social order from the point of view of basic structures was extraordinarily similar to the old one” (1974: 129); to support his argument, Miliband quoted *The Economist* of November 1945, which wrote that the programme implemented by the Labour government was “the minimum expected” (*ibid.*).

1946, a large-scale nationalisation programme, also under pressure from the French communists, who were influential co-authors of the progressive/socialist Charter of the National Council of the Resistance.

Overall, it must be acknowledged that the historical context of the mid-20th century was not favourable to the liberal star. Materialist concerns about the most basic needs – food shortages and rationing were still the norm in most European countries at the end of the 1940s, and in Britain they only ended in 1954 – left no room for the (successful) preaching of the reduction of the state, more private economic initiative, or liberalisation of the moral order. For more centrifugal pressures to grow within society and in the ideological field, nations had to see their socioeconomic levels of income, education and existential security surpass a critical threshold. The economic boom of the 1950s and 1960s – the period of sustained growth and full employment affecting Western European countries and the United States among others – gradually provided these objective conditions necessary for the expansion of a liberal demand. On the one hand, there began the struggle to extend civil and social rights to further social groups (African-Americans, women) and domains of social life (sexuality, family, lifestyle). On the other hand, the continuous expansion of the state, which saw its spending on the provision of welfare services increase generally until the end of the 1970s, created the conditions not only for the emergence of louder and more critical voices in a centrifugal direction, but also for those voices to be more easily heard and followed as the economic environment deteriorated and the system proved increasingly difficult to finance.

The ideological seeds of an economically liberal counter-movement had already been planted in 1944 by Friedrich Hayek, who denounced the totalitarian fate of all centralised state-planned intervention in the economy in a book entitled *The Road to Serfdom*, conceived under the influence of the classical liberal economist Ludwig Von Mises and in direct opposition to the Beveridge Report of 1942. Both Hayek and his book became increasingly influential in liberal economic and political circles in the following decades, most notably the Chicago school of economics, whose most prominent member, Milton Friedman (the author of *Capitalism and Freedom*, 1962, and a Nobel laureate in economics in 1976) would be an advisor to both the Conservative British Prime Minister Margaret Thatcher and the Republican President Ronald Reagan in the early 1980s.

It is at this macro-contextual level that we can understand the rise of the liberal matrix and its gradual power to colonise the conservative and progressive/socialist matrices. This point is of paramount importance with regard to the process of liberal-conservative hybridisation and the affirmation of a predominant liberal-conservative ideological orientation within the Western right in the 1980s; this would be followed by a similar process of ideological hegemonisation of the socialist/progressive camp by the liberal matrix, particularly after 1989 with its zenith in the 1990s. But while this last hybridisation is easier to grasp – socialism is an ideology distinct from liberalism and, as noted in Chapter 5, it has been so since the 1830s – the juxtaposition of modern conservatism with classical liberalism is often considered to be an ideological truism, the very essence of the political right.

As we have observed in Chapters 3 and 4, however, the liberal face (political and, even more, economic) of political conservatism is far from being the prototypical face of the latter; rather, it is the fruit of ideological ‘articulations’ between fundamentally different matrices that have been successfully blended together by specific ideological agents under the impulse of particular historical conditions.<sup>6</sup> While this liberal-conservative ideological hybridisation – *à la* Edmund Burke – existed very early in the constitutionally liberal British context, it clearly does not reflect the fundamental logic of conservatism as typically deployed elsewhere until the late 19th century. If the post-1848 European context favoured a first ‘defrosting’ of the conflictual relationships between the liberal and conservative matrices, a certain mutual crossbreed became more systematic one century later, either in opposition to working-class parties starting to be identified with the state, as in Sweden since the 1930s,<sup>7</sup> or as a consequence of the ideological bipolarisation of the Cold War.

Counter-movements, however, do not arise as automatic responses to ideological movements. There is a mechanism of causality that does not transcend the historical reality, that is, the politics of an era and the policies

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6 Laclau and Mouffe (1985) speak of “hegemonic articulation” to indicate the historically constituted merger of different ideological discourses that come to acquire hegemonic status. They place too much emphasis, however, on the 1980s as the origin of the liberal-conservative articulation, which had historical antecedents much further back in time.

7 Typical of the Swedish party system is a “Scandinavian model” whereby Conservative and Liberal parties belong in the same cluster opposite to the progressive/socialist one, made up of Social-Democratic, but also Communist parties (Strom and Bergman 1992).

of a regime. Ideological counter-movements arise as symbolic responses to 'real' historical processes – e.g., changes in the economy, in technology, in demographics, in international politics – that objectively reflect one of the polar stars of political modernity more than the others. A generalised emphasis on social protection and the reduction of socioeconomic inequalities characterised the post-war era and the economic growth of the following decades, which made it possible to finance the expansion of the welfare state in most West European countries – including countries as diverse as Italy and Sweden and regardless, at least in part, of the political colour of their government.

The bipolar international system also made the rhetorical appeal to liberty among all Western non-communist political forces important, as well as the explicit defence of a traditional social and moral order in opposition to the Soviet socialist order. In other words, the politics of this era was inherently 'interstellar' because the main ultimate goals of (relative) equality, freedom, and order were shared by most parties in the post-war consensus (which is essentially what Daniel Bell observed when, at the end of the 1950s, he proclaimed the "end of ideology", with the exception of mass communist parties). Nevertheless, the general movement of history was centripetal and did not leave much room for the liberal matrix to thrive.

In the post-war decades, the marginal position of European Liberal parties reflected the fact that they were also ideologically marginal. The British and Swedish Liberals were long excluded from office. The Dutch and German Liberals acted intermittently and reluctantly as junior partners of governments that were expanding the welfare state and the social market economy. The few Italian Liberals opposed the state interventionism enacted by the alliance between the Christian Democrats and the Socialists. And the French liberals were practically non-existent in the Gaullist era of pro-state consensus. As for the parties that were closer to the conservative matrix, the post-war consensus on a mixed economy and the growth of the welfare state, in coexistence with a free market, had affected not only the British Conservatives, but also the German and Italian Christian Democrats, the French Gaullists and, for the most part, the Dutch Christian Parties.<sup>8</sup>

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8 Analysis of electoral party manifestos shows, for instance, that positive references by British Conservatives to a state-controlled economy were more frequent in the 1940s and 1950s (4.6% during these two decades together) than in the following forty years of the century (less than 3% on average). While these references were generally less

Only in Sweden (and, to a lesser extent, Denmark) did the conservatives, who had founded a nationalist and protectionist party at the beginning of the century, side with an economically liberal position, but this was mainly the consequence of the political hegemony of the Social Democrats which, starting in the 1930s, had consistently imposed their early Keynesian economic model based on public spending and the growth of the welfare state.

When the welfare state was reaching its maximum expansion, and the socialist and communist parties were attaining their highest scores in Europe, the international economic system experienced its worst crisis since 1929. Once again in modern history, the origin of the crisis was monetary, and concerned the difficulty of maintaining fixed currencies and stable prices after the United States had abandoned in 1971 the new sort of ‘gold standard’ that had been renegotiated with the 1944 Bretton Woods Agreement. The 1973 ‘oil price shock’, the 1973–1974 stock market crash, and the negative world GDP growth in 1974 and 1975 were the close economic and financial consequences of the breakdown of the monetary system and a decisive first step towards the so-called ‘financialisation’ of the economy.

Politically, this meant that the national governments could not afford previous levels of public spending to support the social welfare state, except at the cost of growing public debt and exposure to the whims of the financial markets. The liberal economic credo of reducing the state through cuts in public spending and tax cuts had finally found favourable ground. The risk of economic stagnation and the certainty of growing international competition required more deregulated markets, less interventionist states, more balanced budgets, less unionised workers, and more competitive companies. When Margaret Thatcher in the UK and Ronald Reagan in the USA came to power between 1979 and 1981, after a cycle of Labour and Democratic administrations, their ideological discourse seemed to match the reality of the political and economic context, at least as perceived by

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numerous than pro-market ones, pro-state consensus was clear in the Tory manifestos of the 1955 and 1959 elections. The trend is very similar when one also considers the other European parties classified by the Manifesto Project Database (2020) as belonging to the Conservative family. Moreover, positive references to the provision of welfare services by the state (8%) are also more frequent, among these parties, in the 1950s than in any subsequent decade of the century. As for the parties belonging to the Christian-democratic family, their pro-welfare orientation has always remained rather constant (with an average of 7.5% in 239 manifestos) over time.

growing sectors of the voting public and as it was more and more loudly represented by interested actors.

In the decades of the economic boom, as Figure 7.1 suggests, a generalised consensus on the mixed market economy in the overall discourse of European political parties emerged from the absence of a statistically significant either pro-market or pro-state orientation until 1970. While the early 1970s mark the phase in which a pro-state orientation was strongest, this trend had already disappeared after 1975. It was in the 1980s that a pro-market shift became evident in the overall ideological field of party politics.<sup>9</sup>

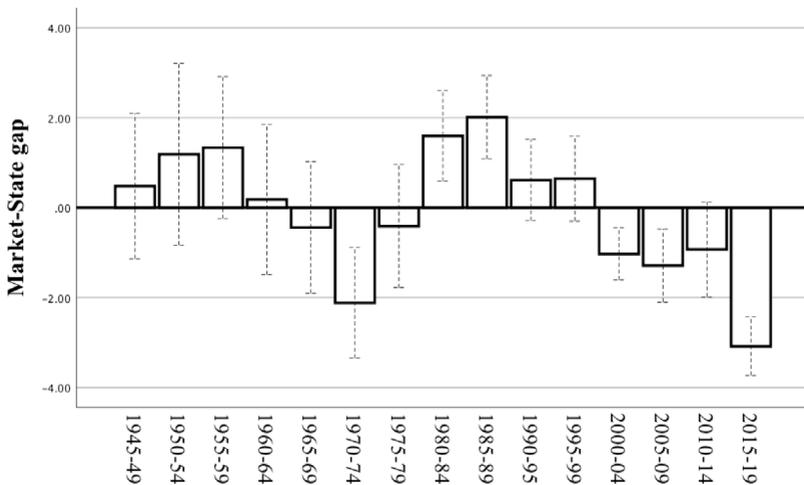


Figure 7.1. Pro-market percentage gap in the frequency of positive references to the free-market vs. state-centred economy in the electoral manifestos (N=1495) of parties from all party families in Western Europe between 1945 and 2020.

Note: The “market-state gap” variable was computed by subtracting the ‘planned economic index’ from the ‘market economic index’ in the Manifesto Project Database. Countries are Belgium, Netherlands, Luxembourg, France, Italy, Spain, Greece, Portugal, Germany, Austria, Switzerland, United Kingdom.<sup>10</sup>

9 When the vertical lines, which symbolise the standard errors associated with the mean value of every bar, do not overlap the zero line, the resulting gap is statistically significant.

10 With the inclusion of the Scandinavian countries, the pattern is the same, except for a pro-market gap that reaches slight statistical significance in the years 1950-1965.

The neoliberal countermovement had achieved institutional legitimacy, if not yet hegemony in the ideological field. But this was not simply due to a cyclical effect, nor to successful communication campaigns; rather, it was due to the better correspondence of that ideological position with the public expectations generated by the economic and political context (to the symbolic representation of which the liberal-conservative ideological agents had successfully contributed). It is therefore in this triangulation of ideological supply (effectively embodied by the political candidates of that time), context, and ‘demand’ (or expectations) that the explanation of the historically decisive events of those years should be grounded.

Remarkably, it was in politically conservative forces such as Thatcher’s Tories and Reagan’s Republicans that this wave of economic liberalism found its most overt application. Of course, the history of the USA was particular in this respect: its democracy was born within a liberal constitutional framework and never needed a classic liberal party to develop; furthermore, the alignment of Republicans against ‘big government’ had already taken hold in the 1930s, in opposition to Roosevelt’s New Deal. And also the British conservatives had always been more liberal, at least metapolitically, than in most other countries. But this specific conjunction of political conservatism – expressed on every occasion in the various but logically consistent forms of moral traditionalism, ‘law and order’ security policies, militaristic nationalism, suspicion of immigrant out-groups – with economic liberalism constituted the hybrid liberal-conservative matrix that would prevail in the political ‘right’ for decades to come.<sup>11</sup>

No statism, organicism, or protectionism characterised this new and highly hybridised ‘conservatism’. The polar star of ‘order’ persisted in the forms of public order and moral order (with the former starting to outclass the latter in the early 1990s). But as regards social order, since the pendulum had swung too far towards equality, at least from a conservative point of view, an alliance with (economic) freedom was necessary to restore a ‘certain’ social order which, because it was less horizontal, could free private

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11 A generalised adoption of a ‘law-and-order’ approach among Conservative parties at the OECD level is also visible from their electoral manifestos, with the beginning of the 1990s as a clear dividing-point: references to these principles constituted, on average, only 2.2% of the overall political discourse of these parties between 1960 and 1990, and they increased to 5.2% in the following thirty years overall (my elaboration on Manifesto Project Dataset, 2020).

property and assets from oppressive state taxation: in just a few years, the tax rates on both the highest incomes and inheritances dropped dramatically (by up to 60 percentage points) in Great Britain and the United States. But while the old conservatives were first and foremost concerned with the preservation of society – the necessary condition for maintenance of their social status – the new conservatives proved to be socially divisive: a war against unionised workers (e.g. the British miners) had to be fought before a new and more acceptable social order could be established.<sup>12</sup>

Overall, however, the rise of the post-industrial economy, the shrinking of the working class, and the more individualistic dispositions of the growing middle classes made the liberal hybridisation of the new conservatism seemingly more suited to the times. And given that the liberal parties were almost inherently uncomfortable with mass politics – their cultural and economic priorities continued to reflect the concerns of smaller segments of voters – it was up to the mass conservative forces, which by the second half of the 19th century had learned to speak to the national masses, to undertake this economically liberal battle of market freedom. Perhaps less predictably, the progressive/socialist forces would, in turn, engage in the politically liberal battlefield of cultural freedom, while also making a change of direction towards economic freedom.

## **7.2. A (neo)liberal takeover of the economy: the social democrats in power from pragmatism to ideology**

In the progressive/socialist camp, the monetary and economic crisis of the 1970s and the “growth to limits” of the welfare state,<sup>13</sup> whose programmes had come to cover all the main social risks and the weaker social groups, soon translated into a slowdown of the pursuit by parties in office of the egalitarian polar star. It was the German Social Democrats (especially from the third Schmidt cabinet, in coalition with the FDP liberal democrats, in 1980) who anticipated this moderate trend. They were followed

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12 Also, Thatcher’s monetarist fight to reduce inflation caused UK unemployment – and social cohesion with it – to peak in the mid-1980s.

13 This echoes an expression used by Flora (1986), which suggests that the welfare state had reached its limit of extension at that time and could only aspire, at best, to enter a phase of consolidation.

by the Italian Socialists forming the first Craxi government (animated by the metapolitical goal of ‘governability’) in 1982; the Spanish Socialist Workers’ Party of Prime Minister (from 1982) Felipe González, who first extended the social security and education system in post-Franco’s Spain, but then began, from 1984–1985, to tackle the public debt with privatisation and restrictive welfare reforms; and the French Socialists at least from the Fabius government in 1986, but in effect already after the first two years of Mitterrand’s Socialist presidency (1981): in 1983, the Mauroy government began to implement austerity measures, because a first socialist phase of strong state investment to raise the incomes, benefits and social rights of workers, pensioners, unemployed persons, and poorer families had resulted in excessive budget deficit and inflation, which was particularly problematic in an increasingly competitive global financial environment. The reversal of the French Socialists in their economic policies aimed at reducing social inequalities marked a decisive turning point in contemporary history, because virtually no future socialist/progressive government in Europe would dare to challenge the imperatives of a financialised and globalised economic system in the subsequent decades.

After 1989 and the temporary establishment of a unipolar international system led by the United States, the so-called ‘Washington consensus’ made its way onto the government agendas of both established and would-be democracies. This strongly pro-market ideological tendency, which is often referred to as ‘neoliberalism’, prescribes sound state budgets (fiscal policy discipline); lower tax rates; stable currencies (competitive exchange rates); liberalisation of international trade and internal foreign investment; privatisation; deregulation of domestic markets.<sup>14</sup> Consistently implemented by the Washington-based International Monetary Fund and World Bank, this economic doctrine, the adoption of which was also a necessary condition for developing countries to receive loans from these institutions, acquired a largely hegemonic status in the 1990s. The collapse in 1989 of the model most radically opposed to that of a self-regulating market not only cast negative light on virtually every form of state intervention in the economy – which was now scornfully called ‘statism’ and ‘welfarism’; it solemnly legitimised free market capitalism as the only viable economic model, and one

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14 These various prescriptions were listed under the label ‘Washington Consensus’ by economist John Williamson (1990).

to be associated with liberal democratic metapolitical systems. With a universalising and naturalising effect typical of ideological modes of thought, this distinctive political and economic preference appeared not only as the only option in the interest of many, but even as a non-option, because no choices seemed to be given (hence the motto “There is no alternative” repeatedly employed by Thatcher and subsequently turned by her opponents into the sarcastic acronym TINA).

It is important to remember that it was at this historical juncture that the founding treaty of the European Union (EU), the Maastricht Treaty, was conceived. The anti-Keynesian, monetarist and fundamentally liberal concerns of price and financial market stability through the tight control of public spending were formalised in the strict convergence criteria (such as a budget deficit below 3% of a country’s GDP, a debt-to-GDP ratio of less than 60% of GDP) to access the future monetary union. With its emphasis on strengthening both competition in the internal market and the competitiveness of EU industry on global markets, the Treaty explicitly adopted the main economic principles of the liberal matrix: “the principle of an open market economy with free competition”.<sup>15</sup> Several directives of the European Parliament and the European Council would follow in the 1990s for the liberalisation of internal electricity markets and rail transport and then, in the 2000s, the so-called ‘Bolkestein Directive’, for the establishment of a single market for services within the European Union. According to the logic of the Maastricht Treaty, the strengthening of competition also involved the implementation of reforms “in particular in the field of contractual relations”,<sup>16</sup> namely in the direction of labour market flexibility. This suggests that the structuring of party attitudes towards the European Union in the following decades – especially the negative ones of the radical ‘left’ and ‘right’ parties – should not assume that the EU is just a metapolitical issue that transcends the modern ideological matrices; indeed, the EU, this essentially ‘interstellar’ project, spoke at its origin with a clear liberal accent.

It is also in this context that we observe another key phenomenon of interest for this book: the affirmation of liberal-progressivism – or, more precisely, a liberal takeover of progressivism – as a hybrid ideological product

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15 Title VI, Economic and monetary policy, art. 102a and 105.

16 Agreement on social policy, article 1.

of the fusion of the liberal and progressive/socialist matrices. While in the 1980s the ruling European socialist parties renounced the egalitarian polar star in the name of pragmatism – they no longer acted according to their ideological goals, but adapted their policies to the prevailing macro-economic context and the ensuing climate of opinion – in the 1990s most of the same parties more openly adopted the liberal polar star for both the economic and political spheres.

There should be no doubt that the economically liberal leaning – or liberal directional shift – of the major Socialist parties in the 1990s was not simply pragmatic, but goal-conscious and (more or less overtly) ideological. Concerted action to support business companies, especially small and medium-sized enterprises, became their priority, as German Social-Democratic prime minister Gerhard Schroeder and British Labour prime minister Tony Blair explicitly claimed in their ‘manifesto’ published in 1999.<sup>17</sup> While affirming their intention to go beyond the “neo-liberal laissez-faire” of the previous two decades, the co-signatories also made it clear that they wanted to avoid “a new period of public deficit financing and massive State intervention as in the 1970s”. How did their ‘third way’ – to use Anthony Giddens’ (1998) famous expression – translate into economic terms? For them, the government’s role was to do “everything they can to support businesses”; to “create the conditions which will allow companies to prosper and adapt”; to open European capital markets “in such a way that growing companies and entrepreneurs can easily access finance”. And how could the Social Democrats make a distinctive contribution? By not confusing “social justice” with “income equality” and affirming “values dear to citizens, such as personal success, entrepreneurship, individual responsibility”. In terms of economic policies, ‘modern’ Social Democrats “must meet increased demands for flexibility” (because “keeping the same job all your life is a past goal”); “reduce the income tax of the most active and of businesses” (because “tax reforms and lower corporate taxes increase profitability and encourage more investment”); in short, they “should be the defenders of small and medium-sized enterprises”.

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17 The full text of the manifesto, which was published on June 8<sup>th</sup>, has been retrieved from “Les Notes de la foundation Jean-Jaurès”, 13, August 1999 (<https://jean-jaures.org/sites/default/files/notes13.pdf>).

Although this ideological orientation deviated, in principle, from ‘laissez-faire’ liberalism, it may be objected, with Polanyi (1944), that the latter has never existed in its pure state in history, because all self-proclaimed classical liberal economic and political actors have never hesitated to rely on governmental support, be it legislative, economic or fiscal (at other times, military). But the main point is that the approach of the British New Labour and the German Social Democrats embraced a kind of ‘supply-side’ economics which is one of the main developments and innovations – but from within a neoclassical (and therefore typically liberal) economic approach – in the economic theory from the 1960s. Neoclassical liberalism should have been complemented, in the words of the Chancellor of the Exchequer of the Blair cabinet and future Prime Minister Gordon Brown, by an “endogenous growth theory”, according to which the State can actively initiate supply-side measures to sustain the market and, hence, economic growth.<sup>18</sup> But while a demand-side approach, such as, typically, Keynesian public spending to stimulate demand, has a direct connection with the socialist/progressive matrix – because it aims to foster economic growth by intervening on people’s incomes and thus reduce socioeconomic inequalities – the macroeconomic philosophy of the supply-side approach aims at growth by creating the ideal conditions for entrepreneurs and investors to develop their initiatives in a free and competitive market.

But this approach was not ideologically ‘innocent’: not only did it reflect, once again, the classical liberal assumption that the general population would also benefit from this wealth (an ideological belief about a mechanism of causality in the social world which was, arguably, partly right and partly wrong, depending on the conditions of its accomplishment); it also had its contemporary roots in economic theories such as the “Laffer curve”, which postulates that too high tax rates depress business actors and thus ultimately reduce the revenues collected by the state. This strong advocacy for tax cuts was adopted and implemented by President Reagan, who drastically lowered top individual tax rates and corporate taxes. But given that the factors of production are not only entrepreneurship and capital, but also labour, welfare benefits must also be eliminated or reduced – according

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18 By misrecognising both the historical and logical continuity between classical liberalism and supply-side economics, some authors have unconvincingly redefined the political economy of New Labour as ‘social liberalism’ on the grounds that the state played an active role in this process (Buckler and Dolowitz 2004).

to this perspective – in order to incentivise potential workers to enter and compete in the labour market. This is why typical policy recommendations within a supply-side economics, which implants the microeconomic logic of individual actors in the macroeconomic policy of governments, includes not only tax cuts, privatisation and deregulation of markets, but also the reduction of social security and a new flexibility of the labour market.

However, this strategic adaptation of classical liberal thought to the reality of contemporary statecraft must be recognised in its fundamental ideological orientation, which is apparent in the values (free enterprise) and interests (those of entrepreneurs, managers, investors and shareholders) that it primarily served. The polar star became economic freedom, the freedom for individual entrepreneurs and companies to thrive and generate wealth. Fighting with legislative weapons against trusts and monopoly positions of (conservative) rentiers is, of course, part of this contemporary liberal battle; and even policies such as tax relief and other state incentives for ‘virtuous’ start-up companies – e.g. from renewable energy to digitalisation, from organic farming to genuine street food – must be understood through the lens of a supply-side economy fundamentally anchored in the liberal matrix, at least when it is associated with a broader trend of weakening social security and deregulation of labour markets.

But this tendency can also be easily converted into a hybrid progressive-liberal discourse, or at least reframed in these terms for communication purposes, as soon as the stress is given to more social, if not egalitarian, goals. Indeed, Tony Blair’s New Labour placed the emphasis on such principles as ‘social justice’ and ‘fairness’ in opposition to ‘social equality’ (which sounded too socialist, especially when understood as ‘equality in outcome’); or on the idea that the ultimate goal is to promote a genuine ‘market economy’, but not a ‘market society’ (as Blair and Schroeder wrote in their manifesto, while French Socialist prime minister Lionel Jospin made this distinction a slogan). However, what clearly fades away in the political discourse of the social democratic parties of the time is the primacy of the principle that the economy should be controlled by the state and not be left to the forces of the free market. This general trend, with its global reverberations, is depicted by Figure 7.2, which shows how the pro-state preferences of

these parties with respect to the free market virtually disappeared, overall, in their election manifestos in the late 1990s.<sup>19</sup>

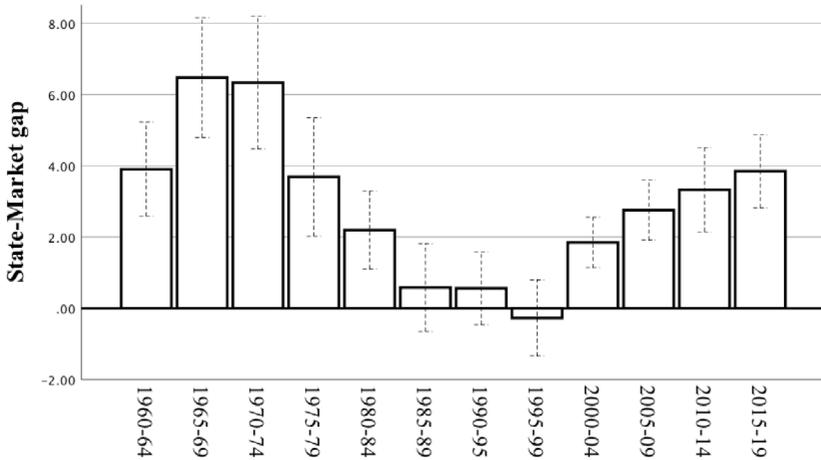


Figure 7.2. Pro-state percentage gap in the frequency of positive references to a state-centred vs. free-market economy in the electoral manifestos (N=583) of Social Democratic/Socialist parties from 1960 to 2020 in OECD countries.

Note: The “State-Market gap” variable was computed by subtracting the ‘market economic index’ from the ‘planned economic index’ in the database available at <https://manifesto-project.wzb.eu/>. Data source: Manifesto Project Database.

These data remind us that contemporary politics, at least in higher-income countries, does not revolve around a dichotomous choice between state and market, because both entities coexist in national configurations of

19 The result is very similar when radical Left and Communist parties are included in the analysis. If controlled by party, the “State-Market gap” becomes negative in the cases of the 1997 and 2001 Labour manifestos (-1.2 both times), while it reaches its historically minimum value for the French PS in the 1997 elections (1.4). As for the German SPD, the pro-state gap is also very low (1.1) in the 1998 elections (it would never be so low again in the next thirty years), although it was not the first time for this party, after it ratified the Bad Godesberg programme in 1959. What remains constant throughout the decades of the second half of the 21<sup>st</sup> century among the social democratic and socialist parties is the positive occurrence rate of the “Welfare” category in their electoral manifestos (Manifesto Project dataset).

economic life, so that the issue at stake is not which one should be entirely dismantled. The ideological orientations, however, manifest themselves in the direction to be given to political decisions, with more radical or marginal changes in the overall state-market configuration. In this regard, it is by looking at the actual economic policies carried out by those parties when they were in office that a provisional answer can be given to the question of whether their ideological direction was more typically liberal or progressive-liberal.

In the political economy of the government of the 'Plural Left' (including Communists and Greens) led by Jospin between 1997 and 2002 the proclaimed rejection of a 'market society' was at least partially confirmed by the government's flagship measures in favour of workers (the reduction of the working week to 35 hours) and the unemployed (the creation of hundreds of thousands of state-funded 'youth jobs'), as well as other minor social measures related to health and housing. The fundamental conformity of the French government with the logic of a liberalised market was however visible in a wave of privatisation or opening up of private capital (e.g. Air France and France Télécom). As for the fiscal measures, they mainly consisted of reducing the compulsory levies on low-income workers, while a symbolic measure of the Mitterrand era – the Wealth Tax (ISF) – was maintained. A similar attempt to maintain or further expand the fundamental structures of the national welfare state was not perceptible in the main economic policies of their German and British counterparts.

Gerhard Schroeder's government proved consistent with the aforementioned 1999 propositions in its reform agenda (called "Agenda 2010") which reduced the social welfare system (namely, the national health insurance and pensions) and made the country more attractive to international investors (for example through the elimination of capital gains tax). More significantly, Schroeder's cabinet reformed, especially in its second term (2002-2005), the labour market by cutting unemployment payments and introducing new and more flexible types of jobs (such as "mini jobs"). Moreover, it lowered tax rates for higher incomes and inheritances, but increased indirect taxation, particularly on consumption. The restructuring of the labour market can probably also be considered the most systematic policy pursued by Blair's New Labour (1997-2007). Overall levels of economic inequality did

not change substantially from those attained by the previous Thatcher and Major (economically) liberal and (politically) conservative administration.

For instance, tax rates for top incomes had already been cut by Thatcher by more than 40 percentage points in less than 10 years, and would diminish further in the early 2000s. The Gini Index, which is a standard measure of income inequality, peaked in 1999, two years after Blair's rise to power, but was slightly lower in 2007, when it returned to the same levels as at the end of Thatcher's administration. GDP grew by more than 3% per year (as in France) in the late 1990s and then remained between 2% and 3% until 2007. Unemployment rates were relatively low (around 7%) when Blair took office and went down to around 5% between 2000 and 2007. Hence, the economy as a whole performed well (especially in 1997, when the New Labour cabinet began, GDP grew by 3.9%) and unemployment dropped further during the Blair years.<sup>20</sup>

As noted, the New Labour philosophy, founded as it was on the principles of supply-side economics (which in the decade following 1989 were reaching the pinnacle of their international popularity), aimed to stimulate growth through incentives to entrepreneurs (so that they would invest in new activities) and people of working age (so that they would work rather than receive unemployment aid). As a result, unemployment benefits were progressively reduced, while working-age benefits (especially in the form of working tax credits) absorbed a significant part of public spending, thus becoming the pivot of the new welfare state. There were, however, some well-known social side-effects to this liberalising policy. Indeed, poverty was observed to shift from workless households to households with at least one adult in paid work, so that the benefits were increasingly directed to people in work but not earning enough (the 'working poor'). Other challenges were the rise in housing costs (but housing subsidies only increased after 2007) and the percentage of benefit claimants for mental or behavioural incapacity (which grew by 10 percentage points in the decade prior to 2007).<sup>21</sup>

While it is questionable – and a more topical question than ever in current 'digital societies' – that a market economy can be pursued without at the

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20 Data retrieved from the World Bank database and the UK Office for National Statistics time series dataset at <https://www.ons.gov.uk/timeseriestool>.

21 The last two figures have been published in "The welfare state: past, present and future", a 2019 report by Robert Joyce for the Institute for Fiscal Studies. It can be retrieved at <https://www.ifs.org.uk>.

same time pursuing a ‘market society’, it was in the public sector that New Labour also made an effort to inject a market-oriented logic. Following a trend already initiated by the Thatcher and Major cabinets, the first Blair administration committed itself to reforming public services using business models and management techniques drawn from the private sector, in order to ensure that public services “are innovative, effective and efficient” and to remove “unnecessary bureaucracy which prevents public servants from experimenting, innovating and delivering a better product”<sup>22</sup>. As suggested by the 1999 White Paper entitled “Modernising Government”, this wave of reforms and modernisation should have been achieved, according to the model of ‘New Public Management’ (NPM) already introduced in the 1980s, not only by extending systematic performance assessments within the public administration, but also by stimulating competition between the public and private sectors.

This was particularly visible in health care, because the National Health System was restructured according to a corporate model in which patients were seen as consumers endowed with greater choice. This consumer-oriented approach was a further derivation of the liberal ideological matrix, because it reflected the logic of the centrifugal counter-movement from which New Public Management historically originated, that is, the growing influence of Hayek’s critique of a pervasive state and subsequent “public choice” theories centred on individual rational preferences of consumers. More recent studies have reported, however, that enforcing individual responsibility and self-reliant choice in health care has proved more profitable to the educated and wealthier users than to poorer patients, and that the resulting ‘health gap’ between middle and lower classes has worsened.<sup>23</sup> As a typical ‘match’ played between the liberal and the progressive/socialist rival approaches, this clearly exemplifies how the ideological trade-off between the polar stars of (more) freedom versus (more) equality always tends to structure political decisions on a wide range of issues concerning the relations among the state, the market, and citizens.

Interestingly, in New Zealand, a country which – as noted in section 6.4 – has approached the liberal ideal type in several respects, the liberal

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22 Extract from the speech delivered by the Minister for the Cabinet Office presenting the White Paper “Modernising Government” at the Commons Sitting of 30 March 1999, retrieved at <https://api.parliament.uk/historic-hansard/commons>.

23 See, for instance, Simonet (2013) and Dalingwater (2014).

counter-movement of the 1980s was not only followed but also initiated by a Labour Party. Despite being a small country of 5 million inhabitants, since the 1930s New Zealand has presented quite typical properties that make it an interesting case study. Indeed, the first Labour Government in 1935, led by a highly unionised working-class party, responded to the great recession not only with Keynesian policies of state-funded public works programmes similar to Roosevelt's New Deal; but also with the expansion of the welfare state and the introduction of universal free health care, on the one hand, and a socialist plan for the nationalisation of large sectors of the economy on the other.

But while the New Zealand Labour Party anticipated the British Labour Party in its progressive/socialist achievements, it did the same with its gradual transformation into a more middle-class-oriented catch-all party after 1951, when it abolished the ultimate goal of socialism. When the new liberal wave arrived, particularly swiftly in a country of the Anglosphere, the incumbent Labour Party adopted radically liberal policies between 1984 and 1990 that transformed New Zealand from a state-driven, protectionist economy to a liberalised free-trade one. It did so with the usual set of reforms involving privatisation, deregulation, reduction of welfare, but also with an early application of New Public Management principles in public services. The huge drop – by almost 50 points – in the percentage of unionised workers in the twenty years following 1980 is an indicator of the extent of this trend, even compared to the British case (minus 20 points in the same two decades).<sup>24</sup> A similar model of political economy was substantially maintained with the alternations in power of the Labour and National (liberal-conservative) parties, at least until a recent more 'centripetal' change of direction (in accordance with a general trend in Western politics: see section 7.4).

It is also noteworthy that such a clear shift in the direction of the liberal matrix as that of New Zealand since the 1980s was achieved in the absence of a liberal party. But this is just another powerful reminder of one of the central theses of this book: the liberal matrix is the main ideological engine of modern politics, whether or not it is embodied by liberal parties. Even

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24 These data refer to trade union density as documented at <https://stats.oecd.org/>. The percentage in New Zealand (69.1%) was particularly high in 1980 also due to a system of compulsory union membership for entire work sectors.

when the “liberal” label is missing, in fact, modern and hypermodern politics is a process that largely involves taking sides for or against the metapolitical, political and economic principles of liberalism.

The description of the core policies conducted by the ruling parties of some of the main Western democracies in the 1980s and 1990s has served, firstly, to follow the economic developments of the liberal matrix. As already noted, a pure ideal type of classical liberalism has never translated into a concrete historical case; similarly, what we now call ‘liberal’ in the economic sphere does not amount, of course, to absolute laissez-faire or a total withdrawal of the state from the economy (except in the pious wishes of some US libertarians). The concrete historical form that economic liberalism has taken over the past four decades (what in the United States would be better understood as “neoliberalism”) clearly envisions a role for the state (as, in fact, it always has), but one that currently consists mainly in activating growth in the framework of a ‘supply-side’ economics by using the tools analysed above. Doing politics from within the liberal matrix or in its direction implies supporting or making decisions that promote a process of liberalisation of society, including the economic realm.<sup>25</sup>

We have also observed a hybrid ideological product such as liberal conservatism – or, more precisely, the combination of the liberal and conservative matrices – with reference to those historical cases in which the demand for a liberalisation of the economy has not been accompanied by a corresponding demand for liberalisation of society. Indeed, what in the United States and the United Kingdom goes by the name of the “New Right” is the result of a historical process of hybridisation of the matrices of freedom and order.<sup>26</sup> This hybrid ideological position, which is sometimes

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25 The author of *Constructions of the Neoliberal Reason* (2010), Jamie Peck, suggests that one should speak, rather than of “neoliberalism”, of “neoliberalisation” as a process (Peck and Theodore 2019). But while Peck justifies this on the basis of the “flexible credo” of neoliberalism (a definition that he attributes to Hayek), the same processual and directional outlook should be applied to any ideological matrix.

26 Regrettably, the ordinary US and European labels for the tendencies that have merged in this hybrid positioning are contradictory and, therefore, utterly confusing. Using the US-based categories, we would say that this mix involves social conservatism and classical liberal economics. However, social conservatism must be understood here as holding traditionalist positions on societal issues (and not as social-oriented conservatism, as it would be in the European tradition). Furthermore, what in Europe is described as economic liberalism would be translated in the US ideological field as fiscal conservatism,

referred to as “fusionism” in the language of US political science, is best embodied by Ronald Reagan and successive Republican presidents such as George Bush and George W Bush until 2008, as well as by Thatcherism in the UK. Indeed, the centrifugal counter-movement that had been incubating in Western societies since the 1960s took the form, on the conservative side, of a new ideological configuration that adopted the liberal polar star of economic freedom, but intertwined it with the conservative polar star of ‘order’, to be primarily declined as defence of the public order and maintenance of a traditional moral order.

### **7.3. Old struggles, new framings. Identity politics and the distinctiveness of the liberal-progressive fusion**

After two decades of post-war centripetal consensus, a centrifugal thrust gradually arose, dating back to the 1960s, in the socio-cultural dimension of the Western world, with a liberal turn coming to characterise the US progressive camp. Especially under the impulse of social movements from the time of the Kennedy administration onwards, salient battles became those for African-American civil rights, against the Vietnam War, and for women liberation and sexual freedom. Deprived of its socioeconomic core, the polar star of equality became predominantly equality in rights, thus joining a human rights discourse typical of the liberal matrix.

Shortly afterwards, this process also occurred in Western Europe, as the socio-structural transformations that these societies were experiencing were similar: sustained economic growth, generational change with baby-boomers entering political socialisation, expansion of an educated middle class, extension of the service sector, but also a development of capitalist economy in the direction – sometimes referred to as “post-Fordism” – of more customised and consumer-oriented chains of production, as well as more targeted marketing strategies. It is not necessary to adopt analytical categories of historical materialism to understand that this wave of social and economic modernisation laid the structural bases for the affirmation of

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while liberalism identifies in that context a progressive position both in society and in the economy. It is useful to reiterate that this book, given its interest in reconstructing the ideological matrices of political modernity, employs the European meanings of these theoretical categories.

new tendencies in the realm of ideas and symbolic systems, and that an objective increase in individualism – such a typical element of Western cultural modernity – was their sociological origin. These new tendencies could also be translated, in their fundamental features, into the logic of political modernity. Once again in the course of relatively recent history, the pendulum had begun to move in the direction of the liberal matrix – this had already happened in the 1780s, in the 1830s, and then again at the beginning of the 20th century and in the second half of the 1920s. The centripetal and socially protective consortium of progressivism/socialism (state-centred economy) and conservatism (social conformity and moral traditionalism, in a form that found its zenith in American society in the early 1950s with McCarthyism) was increasingly under attack by a liberal counter-movement.

This centrifugal move resulted in several ideological responses, as we have noted. But while the liberal economic translation had been led by intellectual elites (economists such as Friedrich Hayek first, then Milton Friedman and the Chicago School of Economics and, after the early 1970s, civil society actors like the Heritage Foundation), the liberal cultural translation was largely propelled by social movements. It was, in fact, in the social fabric, and not in the political realm, that these processes originated. Thus, the standards of the New Left in the United States were now set for the next half century, with freedom as the guiding star and a fundamental direction shift towards the liberal matrix in politics, as well as a gradual push towards greater liberalism in trade and the market (which would materialise especially in the Clinton years – between 1992 and 2000 – and, in some respects, during the Obama administration).<sup>27</sup>

In Europe, by contrast, the workers' movement remained – also due to stronger or (depending on the country) more politicised trade unions

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27 A centrifugal move towards the liberalisation of international trade, for instance, brought together Republican presidents (Ronald Reagan and George H. W. Bush, who set up the first free trade agreements with Canada and Mexico) and Democrats (Bill Clinton ratified the North American Free Trade Agreement and many other anti-protectionist bilateral agreements, while Barack Obama supported the Trans-Pacific Partnership Agreement). By contrast, the centripetal protectionist position contrary to multilateral free trade agreements, based on the socially-protective discourse of the defence of national manufacturing production and jobs, was supported, in the US ideological field and limited to the main political leaders, by the populist presidential candidate Ross Perot in 1992, and by both Bernie Sanders and Donald Trump in the 2016 presidential campaign and afterwards. As president, Trump renegotiated several multilateral trade

– an important social actor in conjunction with the new social movements focusing on post-material rights and whose activists typically belonged to social strata other than the working classes. It was a peculiar social coalition of university students, even of bourgeois origin, and industrial workers that gave rise to marches, clashes and occupations of universities and factories during May 1968 in France, and then in other European countries. But this alliance also symbolised the birth of a European “new Left” which, while still attached to a Marxist discourse of class politics, began to combine the socioeconomic egalitarianism of the progressive/socialist matrix with the demand for the expansion of civil rights and everyday liberties typical of the liberal matrix (albeit in a radical and renewed form). This ‘interstellar’ combination of equality and freedom would increasingly characterise progressive movements and parties in Europe in the 1970s and 1980s, including the Italian Communist party, which was about to become the largest communist party in a Western parliamentary democracy.<sup>28</sup>

These changes were far from trivial, because the progressive/socialist matrix – as it has been reconstructed in this book – did not have liberty rights among its constitutive elements. Although other aims of non-strictly-socioeconomic emancipation were often found in this matrix, they were ideologically derivative – as opposed to being ‘constitutive’ – because they were ultimately associated with the questions of class or socio-economic status. The battle for women’s liberation is an example. Within the progressive/socialist matrix, feminism (or the proto-feminism of the 1840s) was a corollary of the idea that the oppression of women depended on a bourgeois model of family organisation which was highly unequal, that is, much more burdensome for those living in poor socioeconomic conditions. A typical expression of this notion is provided by the early socialist and

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agreements – he withdrew the US signature from TPP in 2017 and signed the new US Mexico Canada Agreement in 2020 to replace NAFTA – and focused his trade policy on raising protectionist tariffs and other barriers to imported goods, doing so in what has often been referred to as a “trade war” with China.

28 A content analysis of parties’ electoral manifestos shows that it was in the 1987 general election that the Italian Communist Party began to clearly integrate environmental and pro-minority claims into its political discourse (data source: Manifesto Project). However, the party had already adhered, in the 1974 referendum, to the struggle led by the liberal Radical Party against the repeal (requested by the forces of the traditional order: Christian Democrats and the far-right Italian Social Movement) of the recent law that legalised divorce in Italy.

feminist Flora Tristan, for whom the oppression of women was directly related to the oppression of the workers, so that the emancipation of the former could not be separated from the emancipation of the latter. Marx himself paid only incidental attention to the question of women, because he assumed that their (desirable) emancipation would be the result of the overcoming of a capitalist bourgeois society. But a feminist orientation could be present (as in Babeuf and, then, Fourier) or absent in the historical manifestations of the egalitarian matrix. The denunciation of socioeconomic inequality could even be accompanied, as in the case of Rousseau and, subsequently, of Proudhon, by patriarchal views on the role of women in the family and society.

The fact that feminist orientations can derive from a progressive/socialist matrix, but also transcend it, is exemplified by the successive treatment that was accorded to women in the Soviet Union – a ‘pure’ and radical type of the egalitarian matrix – during the early Bolshevik and the Stalinist eras: after the 1917 Revolution, Leninist doctrine aimed to make women economically autonomous from men and, to do so, it promoted their access to the labour force. Women workers benefited from the same rights as men (for example, sickness leave, minimum wage, and paid holidays). Divorce was, moreover, made easier and, in the early 1920s, abortion was legalised and “marital rape” made illegal. However, a wave of moral traditionalism typically associated with the conservative matrix arose in the 1930s, when Stalin consolidated his personal power: gender-related policies thus became much more restrictive, whether for divorce, abortion, or homosexuality, which was criminalised.<sup>29</sup>

In other words, while the emphasis placed on women’s work-related socioeconomic equality is derivative of the progressive/socialist matrix, policies regarding a woman’s right to choose (most often in relation to divorce or abortion) reflect an ideological match, or contest, that takes place between the liberal and the conservative matrix (see Figure 7.3). Communism too, therefore, can adopt more liberal or more conservative gender policies in terms of negative freedoms relating to the private sphere. Rather than being a separate political ideological matrix, feminism can thus be combined with the progressive/socialist or the liberal matrix.

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29 Among the numerous works that analyse the condition of women in the Soviet Union, see Buckley (1989), Engel Alpern (1987), Goldman (2002), and Ilić (2001).

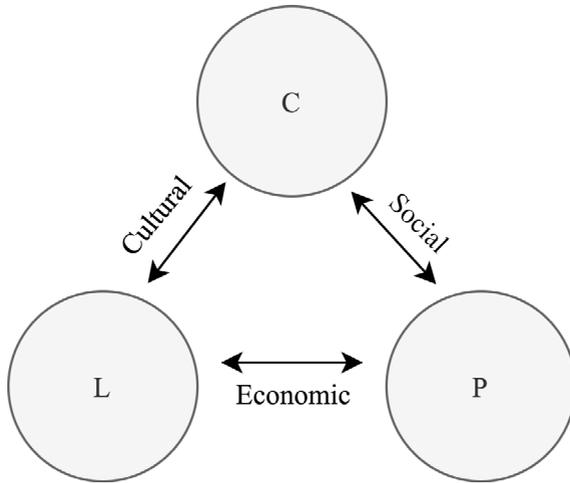


Figure 7.3. A triangle of 'ideological matches'

The political ideological field can be represented as a triangular multi-game tournament in which each match is played by pairs of competitors that vary according to the type of playing field: the matches in the cultural field (e.g. euthanasia) are essentially between the conservative (C) and liberal (L) matrix; in the social field (e.g. mass higher education) between the progressive (P) and conservative matrices; in the economic field (e.g. austerity) between the liberal and progressive ones.

Indeed, feminism has historically also been a derivative part of the liberal matrix, which has the defence of the rights of universal freedom as one of its constitutive principles. According to this perspective, women's rights are simply individual rights – such as the rights to freedom of conscience, expression, but also control of one's body, lifestyle and, more generally, individual self-determination of one's own life project. A liberal framing of women's rights would also claim that the state should not coercively interfere in human rights to freedom, property, and life (John Locke's lay Holy Trinity) and that these negative liberties should be granted to both men and women. The difference between a progressive/socialist and a liberal understanding of women's rights is essentially a matter of framing,<sup>30</sup> that is, of selective emphasis and association of this theme, as well as of its different

30 'Framing' as a principle of selective emphasis and connectivity that suggests how to interpret a message has a long tradition in anthropological and sociological studies of communication, from Gregory Bateson and Erving Goffman to more recent

facets, with different sets of political principles and meanings. The gender wage gap, particularly for lower incomes,<sup>31</sup> is an aspect of gender inequality that logically lends itself more easily to a progressive/socialist framing than do pro-choice positions on birth-control, which appeal, on the contrary, to the sphere of individual self-determination constitutive of the liberal matrix.<sup>32</sup>

There is, however, a third type of political discourse, always with reference to gender and other group identities, which cannot be traced back entirely to the egalitarian or the liberal matrix. This suggests the possibility of a distinctly ‘hybrid’ ideological positioning on some political issues. More specifically, the so-called “identity politics” which emerged with the new social movements of the 1960s can be seen as the expression of a properly liberal-progressive ideological hybrid matrix. Indeed, when one considers social identities related to gender, ethnicity or sexuality, there is nothing uniquely progressive or uniquely liberal in claiming that these should be affirmed and recognised as group identities.

Of course, when the ‘intersectionality’ of race and class, or race and gender (or class, race and gender all together) is invoked, as in contemporary radical feminist tendencies, this reflects a more typical progressive/socialist framing of these themes. Similarly, when equal ‘civil’ rights are sought for women, members of ethnic minorities, or gays, this can comfortably fit into a classical liberal type of framing that points to a freedom of self-determination that should be universally recognised. And not only modern political asylum, a (typically liberal) right of international protection recognised by the 1951 Convention of Geneva within the United Nations, but also individual rights to emigrate – or, in any case, not to be detained or

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applications in the field of political communication. An influential definition of framing in the latter field can be found in Entman 1993.

- 31 A recent attempt to reframe feminism in terms of the socialist/progressive matrix and link it to socioeconomic issues such as housing, wages, and healthcare is that of *Feminism of the 99%*, with its Manifesto published by Arruzza, Bhattacharya and Fraser (2019). This proposal is in direct contrast to that “liberal feminism” whose “real aim is not equality, but meritocracy” (11): praising ‘diversity’ and ‘freedom of choice’ “rather than seeking to abolish social hierarchy, [liberal feminism] aims to ‘diversify’ it, ‘empowering’ talented women to rise to the top” (ibid.).
- 32 The fact that communism as a regime has historically, but also quite logically, been accompanied by totalitarian metapolitical systems makes, of course, such respect for the private sphere both rare and short-lived, as it was in the Soviet experience.

forced to return to their countries – of migrants can be an extension of this human-rights framing (as pursued, for instance, by Amnesty International, which upholds the rights of asylum-seekers, migrants, and refugees).

However, it is also important to appreciate, from an ideological-matrix theoretical perspective, that when a group identity is affirmed as such – as in the cases of the contemporary LGBTQ, #MeToo, and Black Lives Matter movements, especially in the United States, but also with the politics of multiculturalism from Canada to Europe in recent decades – a particular principle is being introduced that transcends and, at the same time, condenses the logic of those two matrices. The normative foundation of this endorsement of group identities – which implies both the (progressive) social emancipation of low-status minority groups and the (liberal) establishment of the individual rights of their members – is found in the concept of ‘recognition’, which was the subject of very rich and intense philosophical discussions in the 1980s and 1990s.<sup>33</sup> ‘Recognition’ can be understood as a social and political process which implies that a group’s identity – in cases as diverse as Muslim immigrant minorities, African-Americans, gays and feminists – is recognised and protected in its diversity, rather than being deconstructed into individual rights of equal treatment before the law.

In fact, recognition of the ‘otherness’ of this collective identity – which must be accompanied by a certain cultural appreciation of it by the adherents of this ideological position – can even give rise to legitimately unequal legal treatment, such as when religious minorities are exempted from working or other duties on their holy days; but also when minority groups – such as African-Americans, but also ‘symbolic’ minorities such as women in male-dominated contexts – are positively discriminated through affirmative action policies, gender quotas, and the like. But identity politics, while it is specular to a politics of difference, also implies the defence of negative rights – e.g. the right of Muslim women not to be sanctioned when wearing the hijab in a Western country – that may conflict, however, with typically liberal principles (the veil being seen, from the latter perspective, as the ultra-traditionalist marker of a patriarchal system founded on religious dogmas). It also implies, as regards the LGBTQ movement, the cultural affirmation of a collective lifestyle that should be respected in all its diversity (as

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33 Some of the major contributions to this discussion were Taylor 1985; Kymlicka 1995; Benhabib 1999; Fraser and Honneth 2003; Pizzorno 2007.

exemplified by the Gay Pride marches), even more than granting same-sex couples the right to marry, to resort to assisted reproduction, or to adopt children (which are more typically liberal rights).

To be sure, there is no class dimension necessarily involved in these struggles for collective recognition, since they may involve groups that are not specifically disadvantaged from a socioeconomic point of view (such as gay or Jewish minorities). But there is also something more, in this recognition, than the claim of individual liberty rights. If we are to see identity politics as the distinctive expression of a progressive/liberal hybrid ideological product it is, therefore, because of this specific combination of collective emancipation, on the one hand, and appreciation (and, in any case, tolerance, with rights) of cultural diversity and pluralism within societies on the other. In this sense, there is nothing more typically 'liberal-progressive' than the emphasis, not on any kind of discrimination, but on specific forms of discrimination related to gender, ethnicity, and sexuality (such as those currently prevalent even in the anti-discrimination policies of social media platforms). And while anti-racism can, once again, be framed in both socialist and liberal terms, contemporary social struggles such as those linked to the "cancel culture" against symbols of white or masculine oppression continue to furnish compelling examples of inherently liberal-progressive logics.

As already noted, the socio-historical origins of these ideological tendencies are to be found, in Western contexts, in the structural changes – economic growth, demographics, education, social stratification, communication technologies, restructuring of the economic system – which flourished particularly in the 1960s. We also observed, however, how the new social movements at that time were still largely coupled, at least in Europe, with ideological tendencies – particularly Marxism – of the progressive/socialist matrix, as exemplified by the French May. In the 1980s, after this matrix reached its greatest historical influence, the gradual disentangling of these symbolic struggles from the struggle for socioeconomic equality became clearer with the emergence of two movements in particular: the anti-war or peace movements, and the anti-nuclear or ecology movement.

Of course, a progressive/socialist framing was still possible and frequent for both these movements, when they were directed against the militarist, "imperialist", and capitalist power of the United States; and against the

predatory exploitation of the planet's resources – especially in poorer countries – by a capitalist economic system. But opposition to war and military action could be motivated with appeals to the right to life of the innocent civil populations, as well as the fundamental right of everyone to breathe clean air, drink clean water, or not be polluted or killed by nuclear power-related accidents. And it was, in fact, this second framing that would tend to become conventional wisdom in the following decades. It had no specific references to issues of social justice or equality but it could nevertheless coexist, in the value systems of both parties and citizens, with progressive/socialist ideological identities.

Therefore, the influence of the liberal matrix in the cultural sphere proliferated in the 1980s, whether it was due to the fact that these issues – together with other freedom-oriented battles, such as those for drug liberalisation, for abortion, or against the death penalty – were becoming increasingly salient in the discourse of progressive/socialist forces; or whether to the fact that these positions were spreading among new generations of citizens who, starting from Generation X (and then, much more blatantly, the Millennials), had not been politically socialised between 1968 and the 1970s. And it was this matrix that became virtually hegemonic – at least in the non-conservative camp – after 1989.

One might be tempted to argue that it is on the basis of strategic considerations – namely, to make their economically liberal turn acceptable to their middle-class bases – that the former Socialist, Social-Democratic and Labour parties brought political liberalism, which was much more consistent with their activists than economic liberalism, to the top of their agendas. In the philosophy of history that is being postulated here, there is certainly room for political agency – whether on the part of party elites or social movements – to influence the evolution of an ideological process, especially at the national level. And although, as we have seen, there has indeed been concerted action on the part of the main European Social Democrats to implement economic liberalisation policies, it is even more important to recognise the (relatively impersonal) centrifugal move of Western political history after decades of consortium between the progressive/socialist and conservative matrices in a centripetal direction. These parties, in other words, were increasingly and invariably adopting policies of both economic and political liberalisation because this was where the cumulative changes in

the international economic system, the structures of European states and societies, and international politics were driving them.

From the end of the 1990s, when the parties of the progressive/socialist matrix were in office they pursued, apart from economic liberalisation, policies drawn from the liberal matrix or, at best, from the liberal-progressive ‘interstellar’ fusion. The German Social Democrats, allies of the powerful Greens (essentially a radical liberal party with a ‘polar’ focus on the environment), on the one hand, invested in renewable energies to the detriment of nuclear power, and on the other, liberalised the law on naturalisation for residents of foreign (especially Turkish)<sup>34</sup> origin and legalised civil unions for same-sex couples. Such civil unions were also implemented by the French government of the ‘Plural Left’ led by the Socialists, while attempts to do so were made by the Italian and Spanish progressives/socialists in the 2000s (unsuccessfully by the second Prodi government in Italy; even with the legalisation of same-sex marriage by Zapatero in Spain, along with the criminalisation of domestic violence).

As for British New Labour, while its discourse was sensitive to the cause of women and people from ethnic minority groups, its political positioning was rather blurred with respect to postmaterialist rights, to the point of appearing at times almost like a liberal-conservative party (for instance, on crime-related issues or the war in Iraq).<sup>35</sup> This specific feature of the British Labour party must, however, be related to the strong personalisation and mediatisation of Blair’s leadership, which made him careful not to deviate from the popular *Zeitgeist* on public order-related issues (to the point of being accused of “mainstream populism”, Mair 2013) and to rely on the right ‘spin’ in the news to create consensus on his politics. And it must also be related to the special relationship of Great Britain with the United States, governed since 2000 by conservative President George W. Bush, in international politics.

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34 The new law on citizenship was adopted in 2000, but only a small minority of those eligible applied for naturalisation because the acquisition of dual citizenship had not been authorised (McFadden 2019).

35 Between 1945 and 2019, the Labour Party manifestos at the 2001, 2005 and 1997 elections were by far the three with the highest scores (respectively, 9.17, 8.99 and 6.87, with an average of 3.0 from 1945) in terms of references to the theme of “law and order” (data source: Manifesto Project dataset, 2020).

## 7.4. Towards the restoration of the polar stars after the turn of the millennium

It has often been said that political conflict in the new millennium has revolved around cultural rather than economic issues. Al Qaeda's 9/11 attack on the United States in 2001 are usually referred to as a defining moment also for the development of the ideological field in Western politics. To be sure, that event and those that followed – from the wars in Afghanistan and Iraq to the subsequent terrorist attacks perpetrated by Al-Qaeda around the world, to the Isis case after 2014 – cyclically perturbed the global political agenda. In addition, these events repeatedly divided Western public opinion around the thesis of the “clash of civilizations” which Samuel Huntington had popularised in the early 1990s with reference to the rise of Islamic fundamentalism as a new identity-based challenge to Western domination in a post-Soviet world order.<sup>36</sup>

However, as already discussed (Chapter 2), religious and ethnic fundamentalisms can be seen as modern (or hyper-modern) ideological reactions to the encounter with cultural otherness favoured by accelerated technological change and the processes of globalisation. What used to be a pre-ideological common sense (or *doxa*) becomes a ‘post-doxic’ position that needs to be justified, like all ideologies, with worldviews, universalistic values (polar stars), well-identified enemies and a call to action by professional ideologists. The structure of these reactions is common to both Islamic fundamentalisms and Western ultraconservative cultural ‘recoding’ of “God, nation, family, and community” (Castells 1997), those traditional symbols that have always been, in fact, at the centre of ideological modernity, particularly in what we have called the ‘matrix of order’.

At the apogee of the liberalisation process – propelled by globalising financial capitalism and refracting on the ideological field as a generalised pro-market orientation (see Figure 7.1) – the seeds of an anti-liberal counter-movement were already germinating in both hypermodern societies and those just modernising. A distinctive feature of what this book has conceptualised as the ‘double movement of modernity’ is a continuous opposition of centrifugal (i.e. liberalising) thrusts and centripetal (socially protective)

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36 “The Clash of Civilizations?” first appeared as an article in *Foreign Affairs* in 1993, and was later extended in *The Clash of Civilizations and the Remaking of World Order* (1996).

counter-movements which alternately tend to prevail in given historical phases. And even if one were to argue that the centrifugal movement corresponds best – with its social differentiation, individualisation, liberalisation – to the profound essence of modernity, this always tends to entail the centripetal backlash from those who, given their position in the social space (from unskilled workers to traditionalist elderly persons, to those living in areas in economic decline), do not perceive that they are benefiting from these structural and cultural changes. If the general movement of history is centrifugal, centripetal counter-movements can be interpreted as lower-scale cyclical reactions (the ‘matryoshka doll’ effect) destined to become rarefied in the long run. But if we remain sceptical of this teleological view of modern history we can hypothesise, as we have done so far, that centripetal counter-movements are far less anti-modern than they are a constitutive element of modernity itself. And we can thereby expect the duality of this movement not to be attenuated but, rather, intensified in our ‘hypermodern’ times, in which the often-cited ideological polarisation would be nothing more than an expression of the contemporary radicalisation of the double movement of modernity.

The attacks of 9/11 should, in this perspective, been seen as a radically violent and destructive consequence of processes that were already at work in globalising societies, rather than being the cause or the origin of a new era of political conflict over cultural values. Of course, in the recursive logic of historical processes, the events of 9/11 further exacerbated a dividing line which was, however, already the primary source of conflict in the ideological field of Western democracies, at least in the last decade of the 20th century. This refocusing of the political conflict around the cultural dimension was due, however, more to the ideological convergence of the forces of the conservative and progressive/socialist matrices on the principles of economic liberalism than to a particular polarisation between the polar stars of ‘order’ and ‘freedom’ in the socio-cultural sphere. Having temporarily lost their respective polar stars in the management of socioeconomic order, both mainstream conservative and socialist parties mainly differed in the discourses and policies over issues relating to moral and public order. The former, however, were not specifically emphasizing these values – in any case, not more than their economically liberal inclinations; and the latter, whose cultural liberalisation had been under way for decades, were not playing ‘their own match’ but, rather, a match on behalf of the liberal ideological matrix.

These claims are not purely narrative: beyond the selective policy analysis conducted in the previous section, they rest on the evidence provided by the analysis of the political discourses of conservative and socialist parties across several decades. Figures 7.4 and 7.5 empirically capture the temporary ‘deviations’ of the European Conservative and Social Democratic parties from their respective guiding principles and in favour of those of the liberal matrix.<sup>37</sup> Both European party families, of course, have pursued, in the liberal constitutional democracies in which they have operated since the end of the Second World War, relatively ‘interstellar’ political goals which are characteristic of parties that are far from being ‘pure’ ideological types or their radical expressions. For this reason, the values on the vertical axis, which measures the overall conformity of the parties to their respective ideological matrices, are not always strongly, or sometimes not even significantly, positive between 1950 and 1980. The deviation, however, becomes evident for the conservative parties in the 1980s and for socialist parties in the 1980s and 1990s. The former went too far, by the standards of their ideological matrix, in their emphasis on economic liberalism, while the latter inhibited their propensity for the state regulation of markets and focused their discourse on extending civil liberties.<sup>38</sup> What we can now interpret as a tendency to the restoration of their ideological polar stars was visible, for both party families, in the first decades of the new millennium. We shall return to this point later.

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37 Parties from all Western Europe are included, with the exception of the Scandinavian countries: as already noted, the Scandinavian conservative parties present an earlier pattern of liberal-conservative hybridisation due to historical development of the welfare state dating back to the 1930s, with the prodromes of a “Nordic model” being implanted not only in Sweden, but also in Denmark, Norway, Finland and Iceland (Erikson et al. 1987).

38 The “Order-Market economy gap” in Figure 7.4 was obtained by subtracting the favourable mentions of the free market, capitalism as an economic model and economic orthodoxy (“Markeco” index in the Manifesto Project dataset) from the favourable mentions of the “National Way of Life”, “Traditional Morality” and “Law and Order” categories in the same dataset. The resulting ‘gap’ is the difference in percentage points in the occurrences of one type of message or another in the electoral party manifestos. As regards the “State economy-liberties gap” in Figure 7.5, it subtracts the favourable mentions of the “Human rights”, “Multiculturalism”, and “Minority groups” categories from the favourable mentions of market regulation, controlled economy and economic planning (“Planeco” index in the Manifesto Project dataset).

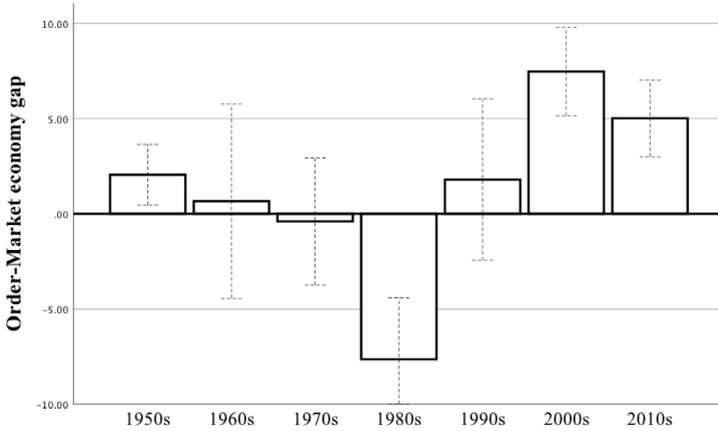


Figure 7.4. Pro-order percentage gap in the frequency of positive references to order vs. free market in the electoral manifestos (N=113) of conservative parties from 1960 to 2020 in Western Europe.

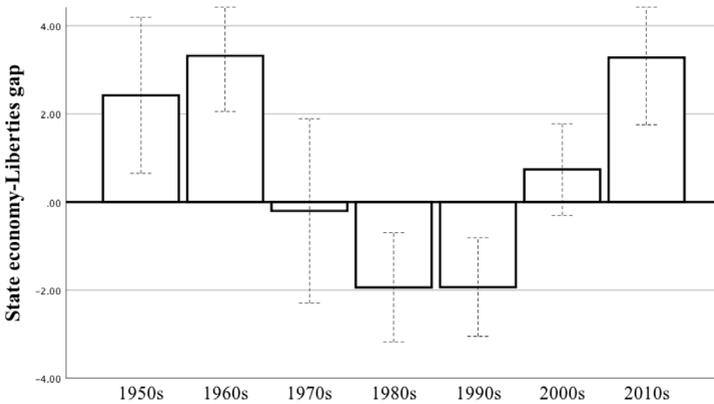


Figure 7.5. Pro-state percentage gap in the frequency of positive references to the state regulation of markets vs. civil liberties in the electoral manifestos (N=276) of social democratic/socialist parties from 1960 to 2020 in Western Europe.

Perhaps it should be reiterated that the loss of the polar stars did not originate in the realm of ideas, as a mere consequence of changing relations of discursive power in the field of political philosophy. As noted, the oil

crisis and the global economic recession of the mid-1970s had favoured the beginning of the state's gradual (and temporary) withdrawal from the economy and the rise of a generalised pro-market orientation (figure 7.2). The Soviet collapse of 1989 had given rise to the new unipolar and US-dominated international system (see Chapter 2) in which both conservatives and progressives came to an agreement on the ineluctable affirmation (via financial and political globalisation) of capitalism within a liberal-democratic metapolitical framework. There followed, in the 1990s, a sustained period of economic growth which maintained the conditions for the prolonged relegation to the background of the issues of wealth distribution and the "losers" of globalisation.<sup>39</sup> This reminds us that the relative visibility of the polar stars (and the effectiveness of their ideological message) depends on the situation of the social 'planet' as defined, at the macro level, by factors such as the state of the economy and the balance of power in the international system.

At the turn of the new millennium, the Western ideological field was thus fundamentally divided into two main camps, both of which seemed to be profoundly colonised by the economic, social and – in the progressive camp – cultural principles of the liberal matrix. On the one side, there were the liberal-progressives of a left that had bracketed off the social question (reduction of socioeconomic inequalities, emancipation of unprivileged strata and classes, defence of wage workers) and embraced the (largely post-materialist) recognition of sociocultural collective identities and rights of minority groups (from homosexuals to ethnic minorities) and symbolic minorities (women). It had also assumed the new individual rights to "life, freedom and property" associated with peace, the environment, migrations and the abolition of the death penalty, as well as with pro-choice stances in the realms of life reproduction or drug consumption.<sup>40</sup> On the other side

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39 Between 1994 and 2007, the world economy (GDP growth) grew by no less than 2% and over 4% per year. While both the euro area countries and the 37 OECD countries experienced similar growth in the second half of the 1990s, after 2001 they started to grow significantly more slowly (especially those in the euro area) than the world average until the stagnation of 2008 and the collapse of 2009 (and, in fact, even afterwards, until the following and even more severe collapse in 2020 due to the Covid-19 pandemic). Data sources: World Bank and OECD databases.

40 Support for these issues is necessarily underestimated in the party manifesto analysis, given their weakness in generating electoral payoffs.

stood the liberal-conservatives of a right that had fully adopted the classical liberal creed of a free-market capitalist economy, albeit in the revised version of a supply-side economics, and combined it with the defence of a relatively traditional social and moral order through the typical conservative appeals in the era of mass politics. Religious or national, in both cases these appeals emphasised issues of public order, sometimes through a “zero-tolerance” approach towards not only crime<sup>41</sup> but also other forms of social deviance.

If this cultural cleavage was initially a sort of residual consequence of the suspension of the economic conflict, a radicalisation followed, as noted, with the overcoming of a unipolar US-led international order, the “war on terror” of President George W. Bush and the end of a relatively long cycle of economic prosperity in the early 2000s. It was in this decade that conservative parties reconciled with their traditional ideological matrix, as shown in Figure 7.4, restoring the principle of order as their guiding star, in a form that was only less radical than that of far-right parties. The perception of this cultural conflict became patent among political scientists in the first two decades of the new century. An analysis of the “expert surveys” conducted in different waves on the positioning of all European parties corroborates, as Figure 7.6 shows, the idea of a cultural clash that essentially takes place between the defenders of the matrix of order, in their radical/purer and moderate/hybridised variants, and those of the matrix of freedom. In the latter, which has the Greens (clearly more than the classical Liberal parties) as its contemporary standard-bearers, the parties of the progressive/socialist matrix have also converged to different degrees.<sup>42</sup>

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41 A “zero tolerance” anti-crime policy was famously adopted by Republic Rudy Giuliani when he was mayor of New York City, between 1994 and 2001.

42 I obtained this index of cultural conflict by combining the following three variables of the Chapel Hill Expert Survey—Trend File: position on social lifestyle (e.g: rights for homosexuals, gender equality, support for versus opposition to liberal policies); position on ethnic minorities (support for/opposition to more rights); position on civil liberties vs. law and order. The reliability level of the resulting index is very high (alpha=0.95 for the party families and countries considered).

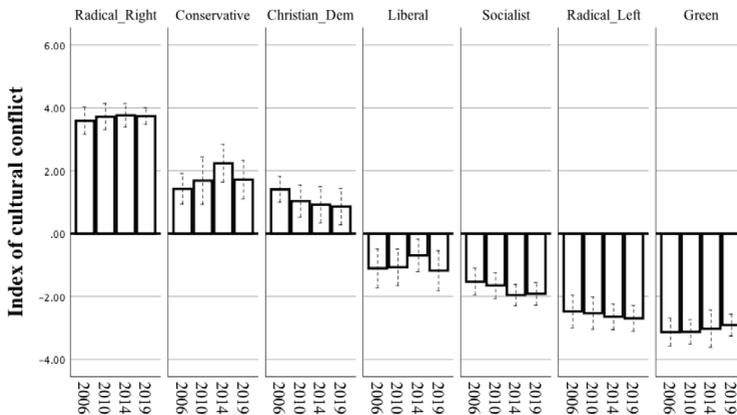


Figure 7.6. Index of cultural conflict ranging from +5 (pro-order) to -5 (pro-freedom) by party family in Western Europe from 2006 to 2019 (N=416)

Before the attacks on the Twin Towers, only the anti-globalisation movement, with its critique of the new world order founded on capitalist globalisation, seemed to embody the remnants of the egalitarian matrix which, in the ongoing configuration of the ideological field, was marginalised in the extra-parliamentary space of radical progressivism. The constitutive principles of the ‘pure’ progressive matrix, in other words, were still professed only by the far left, at least in Europe and the United States. On the other hand, the slow migration of the low-income/low-education categories of ‘globalisation losers’ such as, most typically, manual workers from progressive/socialist to radical-right populist parties had begun, as the 1995 French presidential election demonstrated.<sup>43</sup> While the appeal of these parties had always been based primarily on their ability to make the immigration issue salient and to hold immigrants responsible for disrupting the national order, it can be clearly documented that there was a shift from their previous devotion to economic liberalism to socially protective economic discourses and recipes, with the end of economic prosperity first, and then the aftermath of the 2009 recession.<sup>44</sup>

43 National Front candidate Jean-Marie Le Pen won 15% of the popular vote, with a significant working-class base as well. See, among others, Mayer and Perrineau 1995; Gougou 2015.

44 In the party manifestos (N=124) of Western European radical-right parties, positive references to welfare more than doubled – from 5% to 11% overall – when comparing the

The socially protective, and thus centripetal, counter-movement to the – socially centrifugal – movement of liberalisation of the 1980s and 1990s is, however, even more conspicuous in the ranks of the progressive/socialist matrix. Among these parties, the ultimate goal of reducing socioeconomic inequalities became increasingly central during the first two decades of the new century, with its provisional peak reached between 2015 and 2020.<sup>45</sup> This is not surprising, since important processes of ideological radicalisation or hybridisation in the era of mass politics followed major financial crises for decades, such as those of 1873, 1929, 1973-1974, and 2008. The socially disruptive effects – in terms of unemployment, loss of household income, downward social mobility, and future prospects for both Western working and middle classes – of the 2008 financial crisis, with the subsequent banking crisis and the great recession, are still being experienced

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average of the 1980s and 1990s with that of the 2000s and 2010s (data source: Manifesto Project database, “Welfare” variable). Positive references to the free market, on the other hand, decreased (from 6.6% to 2.2% on average) between the same two time periods. A certain welfare-nationalist turn was taken, as far as the French National Front is concerned, mainly by Marine Le Pen, daughter of Jean-Marie Le Pen and successor at the head of the party since 2011 (see also Ivaldi 2015). A ‘social tendency’, however, has always existed among the ranks of the European far right, following the tradition of fascism and early national-socialism, as testified, among others, by the current of the so-called “social right” within the Italian parliamentary far right of the 20<sup>th</sup> century. In more recent decades, this ideological hybridisation has also been revived by new advocates of so-called “National-Bolshevism”, with its European philosophical ramifications even in the ranks of a certain radical left. As discussed in sections 6.2 and 6.3, this positioning broadly corresponds to a radical hybridisation of the matrix of order with the social leanings of the socialist/progressive matrix (and vice-versa). It also corresponds to the “P/C” ideological class of the diagrams in Chapter 1 and the figures in Chapter 8.

- 45 Empirical evidence in relation to the political discourses of the social-democratic parties in Western Europe is provided by Figures 7.2 and 7.5. Evidence of an increasingly socially protective and egalitarian trend since the early 2000s becomes even clearer on adding together the two categories of the Manifesto Project that positively refer to the state-regulated economy (“planeco” variable) and to pro-welfare positions (“welfare” variable): covering an average of 27% of the overall manifestos of these parties over the period 2015-20, the socialist/progressive discourse appears stronger than in the early 1970s and more than 12 percentage points above its lowest average value in the 1990s. Contrary to more structural redistributive policies typically conducted by the state, however, anti-poverty welfare measures do not question the hierarchical configuration of the existing social order and, for this reason, are less useful in distinguishing a progressive/socialist ideological discourse from a conservative one.

by contemporary adults, as well as being well documented in hundreds of economic and sociological publications.

Social protests such as the Occupy movement in the US and the Indignados movement in Spain in 2011 were but epiphenomena of an evolving socio-economic environment that pushed the political forces of the progressive/socialist matrix back towards the egalitarian principle. The related European debt crisis initially seemed to produce broad consensus on the need for severe austerity policies in order to reduce government budget deficits, to the point of leading to the 2012 ratification of the European Fiscal Compact, which imposed – among other things – adoption of the classical liberal principle of limited government spending in the constitutions of the member states. The harsh economic and social effects of the implementation of these measures – essentially consisting of cuts in public spending – in a recessive context, as well as the orthodoxy displayed by the EU political and banking authorities in the management of the Greek debt crisis and that of other eurozone member states, namely in the strict conditionality of bailout programmes, favoured the emergence of a socially protective demand that was gradually picked up by progressive parties, as well as exploited by the radical parties of the matrix of order for their nationalist and protectionist supply.

While much attention has been paid, especially in US political science, to the phenomenon of ideological polarisation between liberals and conservatives in the form of a cultural conflict over moral values, the return of a progressive political discourse denouncing the rise of socioeconomic inequalities has not been recognised in all its importance for the development of the contemporary ideological field.<sup>46</sup> As already noted, the cases of Jeremy Corbyn's leadership of the Labour Party between 2015 and 2020 and Bernie Sanders' challenges to the Democratic presidential nomination in 2006 and 2020 have only been the most visible symbols of a process of resumption of the egalitarian polar star within the progressive/socialist

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46 Influential actors in the ideological field are also those economists who, like Thomas Piketty, Branko Milanović, Dani Rodrik, Stephanie Kelton and Marianna Mazzucato, have contributed to putting the theme of socio-economic inequalities back at the top of the public agenda, also highlighting their growing trend in recent decades. Another influential actor in the ideological field has been Pope Francis, with his explicitly critical message regarding market freedom and economic liberalism, as he wrote in his Encyclical "Fratelli Tutti" (2020, 168): "The marketplace, by itself, cannot resolve every problem, however much we are asked to believe this dogma of neoliberal faith".

camp.<sup>47</sup> Likewise, the Brexit referendum and Donald Trump's two electoral results in the 2016 and 2020 US Presidential elections, despite his not winning the popular vote in both cases, have only symbolised a broader restoration of the polar star of order – primarily in the form of a national order – within the conservative camp of the Western world and beyond (from the consolidation of power of Vladimir Putin in Russia and Erdogan in Turkey to the ascension of Narendra Modi in India and Jair Bolsonaro in Brazil),<sup>48</sup> a restoration anticipated a few years earlier by the Tea Party Movement – a sort of conservative counterpart of the Occupy Movement on the progressive side.<sup>49</sup>

Competition over cultural and social goals with economic convergence seems to have given way, in many respects, to socio-cultural conflict with economic divergence. It goes without saying that these ideological revivals always come about in relatively new forms, in historically diverse contexts, and within ever-changing decision-making environments. But when analysed through the lens of an ideological matrix, the fundamental direction of a policy-related or more general orientation of both an individual and a collective actor can still be easily recognised as reflecting one or more of the ideological matrices of modernity. And reminiscences of the ideological field of the late 19th century – from the ultra-conservative anti-Dreyfusards

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47 In the 2010s, the post-recession context which favoured the rise of a socially protective demand in the electoral markets has successively brought to the government of their countries, considering only Southern Europe, parties such as Syriza in Greece, the Portuguese Communist party, Podemos in Spain, the Five Star Movement in Italy. In the Scandinavian area, since 2019 the Frederiksen Cabinet in Denmark has consisted of a progressive/socialist parliamentary alliance led by the Social Democrats, characterised under Mette Frederiksen's leadership by a more social-oriented and much less liberal (e.g. towards immigrant minorities and refugees) stance.

48 For further examples of radicalisation, along both the progressive/socialist and conservative matrices, of the ideological field of party politics in the 2010s, see the end of section 2.3.

49 The Tea Party Movement began in 2009 as a radical hybridisation of the liberal and conservative ideological matrices, with a markedly populist slant. The liberal-matrix component was found in what in the United States is called "fiscal conservatism" (i.e., economic liberalism), which also rallied many libertarian (anti-big government) activists around the movement (Skocpol and Williamson, 2012). Over the years, however, the culturally ultra-conservative or reactionary component (as described in Hochschild 2016) became the predominant trait of its political identity and provided an important social foundation for Donald Trump's subsequent electoral rise.

to the liberal-progressives *à la* Emile Zola, from protectionist and pro-welfare conservative leaderships to the British Fabians or the German Marxist Social Democrats – are more than a suggestive metaphor; they are the *fil rouge* that historically links the ideological matrices of modernity to their contemporary expressions and reinterpretations. In some respects, and in relation to the ideological field, the 20th century may be dead and gone, but the 19th century has perhaps risen from its grave.

### **7.5. Beyond classification: reflections on the dynamic and directional elements of the ideological matrix**

This book has hitherto attempted to provide a dynamic theoretical account of how political elites, parties, social groups and individuals adjust their ideological positioning to the prevailing macro-cultural context, the state of the field of conflict involving collective actors, the cycle of socio-political movements and counter-movements, and the ideologically alternative framings of a given issue. Such constant adjustments and readaptations are always liable to be interpreted either as relatively innovative ways of applying an ideological matrix – in its derivative principles – to new political situations; or, on the contrary, as directional shifts that deviate, at least to some extent, from the constitutive principles of one ideological matrix in the direction of another, thus approaching some kind of ideological hybridisation (or, sometimes, a straightforward transfer to another matrix). In other words, it is certainly not a static and fixed framework anchored in the past that has been proposed to interpret contemporary politics. Each of the above ‘dynamic’ elements warrants some further discussion.

First, it should be noted that intra-societal cultural changes in the space of a few decades can overcome ‘synchronous’ inter-ideological differences. This means that a liberal and a conservative positioning on an issue, say sexual freedom, or taxes, will differ from each other more over time than at any given time. A contemporary conservative stance on sexual norms will predictably be more liberal than a classical liberal stance only a few decades ago – this is blatant in the case of homosexuality since the 2000s – not to mention the late 19th century. Similarly, today’s liberal-conservative positions on acceptable levels of taxation (e.g. a flat tax of 30%) are considerably more ‘progressive’ than the progressives’ own stances in the early 20th

century, when the tax rates applicable to the highest incomes did not exceed 1%, both in Europe and the United States (Piketty 2019: 634-5). This point reminds us that reality is always relational and that, in this case, what matters in ideological terms is the conservatives' general disposition towards stricter sexual norms when compared to liberals, and the liberal-conservatives' disposition towards lower taxation when compared to socialists/progressives.

A similar observation also applies to inter-country differences, which can also reflect, at least in part, different national speeds in the modernisation process. Of course, a more clearly 'culturalist' interpretation of the forms and limits of modern ideological expressions would be necessary in relation to the analysis of national contexts historically very different from the European cases, especially in those Asian countries which did not undergo direct Western colonisation, such as Japan, China, and Thailand. In those cases, greater epistemological caution is necessary when entangling the meaning and nature of ideologies such as liberalism, conservatism, and socialism, even though similar 'polar stars' can help in interpreting the relative policy spaces. When it comes to comparing different Western European countries on the basis of a parsimonious model, however, the specificity of national traditions is less likely to differentiate a country by its nature than the pace of its evolution towards a relatively common pattern of economic, cultural, and social 'development' (this term being used neither in normative terms nor in a historical teleological sense, that is, one presupposing a natural human evolution in a given historical direction).

That said, it is necessary to analyse our relatively invariant ideological matrices in light of the space-time context in which ideologies are constantly redefined, like a sort of mutant virus, in their contingent manifestations. Thus, the British and German conservatisms of the mid-19th century, while sharing some important defining features (especially in opposition to those characterising liberal political forces), also differed radically in their social and ideological expressions. Likewise, the French, German, and British concrete expressions of the socialist ideological matrix at the end of the 19th century reflected different national levels of influence exercised by the republican, Marxist, and Fabian traditions of political mobilisation of the left respectively. During the 1930s, Stalin-led communism in the Soviet Union and the *Front populaire* (which included left radicals, socialists and communists) in France were, even more blatantly, very different

historical articulations of the same ideological matrix pursuing socio-economic equality, although with different degrees of ‘purity’ and with very different levels of adherence to the metapolitical principle of constitutional liberalism. Hence, the polar star approach affords great flexibility in the analysis of historically constituted political spaces, but without neglecting the presence of recurring elements drawn from one of the general ideological matrices. In the logic of the social sciences, every historical case is considered as an instance, with its own particularities, of a more general pattern of regularities.

A second point against the risk of providing a ‘static model’ is that *how* each ideological matrix translates into actual bundles of political dispositions and policy options depends on the specific field of conflict in which ideologies continually redefine themselves. This point probably captures Mannheim’s most brilliant insight into the logic of a political sociology of ideologies, which should consist first in relating political ideas to ideologies, and then in relating ideologies to political fields of conflict.<sup>50</sup> This idea reflects what Mannheim (1929: 112) designated as “the dialectical relationship between theory and practice”, whereby theory, which is a function of reality, leads to a certain type of action which in turn changes reality (and the subsequent theory).

It is, therefore, as a consequence of the actual political positioning, decisions and ‘actions’ of the political and social actors of the moment that ideologies are adjusted and reinterpreted in response to changing circumstances. And while Mannheim never used the expression ‘ideological field’, it was precisely this idea that he had in mind when referring to the dialectical dimension of ideologies: the arena of conflict around collective decisions involving political and social actors, each of which occupies a specific position in both the political and social space. In fact, a sociological and realist approach to the study of ideologies differs from political philosophy in the importance attributed primarily to the link between political ideas and the positions of their bearers in the social world and, secondly, to the constant symbolic struggles among actors pursuing their interests and values in the political field and endowed with different degrees of institutional and communicative power.

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50 This point was brilliantly made by Breiner 2013: 5.

New combinations of conservative, liberal and progressive/socialist ideological matrices unfolded in the United States, for example during the 2010s, as a result of an ideological field in which particularly prominent actors were Barack Obama, the Tea Party Movement, Fox News, the Health Insurance companies, MSNBC News, the National Rifle Association, Hillary Clinton, Facebook, Donald Trump, the Supreme Court, Bernie Sanders and the ‘Socialists’, Black Lives Matter, as well as dozens of other institutional, partisan, civil society, and economic agents. The main events, circumstances and actions in which these actors were involved, more or less intentionally, over the course of the decade have, in turn, affected the ideological restructuring of the political field. Among the ideological currents in the United States of the 2010s, the most distinctive were probably those represented by Donald Trump, on the one hand, and Bernie Sanders on the other.

The presidential candidate and, subsequently, President Trump gave birth to a reinterpretation of the conservative matrix that combined the following: economic protectionism; advocacy of border controls and cultural nativism; nationalism, but also isolationism in international relations; policies of lower taxation on high incomes; anti-gender rhetoric; and racially divisive politics. As is well known, Trump’s social coalition comprised lower social strata displaced by deindustrialization, “big business”, white males belonging to older cohorts, the evangelical churches, the rural and small-town inhabitants of the central States, and a galaxy of minor groups. With flagrant differences from Reagan’s liberal conservatism of the 1980s, but also with G.W. Bush’s more standard “compassionate conservatism” in the 2000s,<sup>51</sup> Donald Trump’s charismatic movement came to define a relatively new identity for the American right (Tarrow 2019). Ideologically, this collective identity was based on a blend of cultural conservatism, economic protectionism, and – *metapolitical* – “authoritarian-populism” (Norris and Inglehart 2019). It was especially the last ingredient – a new pattern of relations among the President, the other state institutions, and the people – which marked the main difference from previous historical expressions of the conservative matrix in the United States.

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51 Together with so-called “neoconservatism”, which mainly implied interventionism in international relations.

In the polarised political environment that characterised the first two decades of the 21st century, the other main ideological current that emerged during the 2010s was, on the political supply side, Bernie Sanders' embodiment of the progressive matrix. Having been twice (in 2016 and 2020) a very competitive candidate in the Democratic primary elections, Sanders advocated progressive policies aimed primarily at reducing socioeconomic inequalities, such as Medicare for all, raising the minimum wage, free college tuition, taxes on financial transactions and inheritance taxes for large fortunes. Although he also endorsed the main hybrid liberal-progressive and post-materialistic stances concerning gender, race, environment, and sexuality, his emphasis was undoubtedly on the socioeconomic issues mentioned above (or on a progressive framing of race, seen in its direct interconnection with class). While Sanders' rhetoric echoed, at least in 2016, some of the anti-billionaire and anti-big bank slogans of the 2011 Occupy Wall Street movement, this apparently populist trait was but a metapolitical complement to his ideologically progressive/socialist agenda.

However, neither Donald Trump nor Bernie Sanders – who generated genuine charismatic movements by relying on masses of followers manifestly devoted to the leaders and their political discourses – should be regarded as mainly responsible for their relative successes. In fact, they limited themselves to interpreting and actively representing broad popular demands and public expectations, which were, in turn, a reflection of the defining properties of a historical context. Indeed, it is predictable that a context marked by an economic recession associated with an increase in income and wealth inequalities will not generate liberal demand, nor will it reinforce the cultural and economic grievances of the liberal ideological matrix.<sup>52</sup> In fact, such a context will provide the ideal ground for the activation of progressive/socialist demands, if properly mobilised by some political actor. At the same time, however, this type of context also lends itself to being politically exploited by the ultraconservative discourse of restoring a principle of order which, in a crisis situation, can be portrayed as threatened by social or cultural outgroups. These are two opposite expressions of a 'centripetal counter-movement' opposing a 'centrifugal' and liberalising

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52 The idea of a mechanism of "thermostatic" compensation within public opinion was advanced by Stimson (1999), who applied it, more particularly, to conservative and liberal public opinion cycles in the context of US politics.

movement, both of which constitute what I have called the ‘double movement of modernity’.

There is, therefore, no predetermined result in this process, because the success of one or the other form of this socially-protective counter-movement depends on the existence, the strength, the political legitimacy, and the communicative ability of the potential mobilisers. The aftermath of the 2008 recession favoured the emergence of progressive Syriza in Greece and Podemos in Spain, but also the rise of national conservative UKIP in Britain and the Front National in France. It should also be reiterated that, among the most notable responses to the social and political consequences of the great recession of 1929 – which in turn followed the Wall Street slump – one can mention F.D. Roosevelt’s New Deal, on the one hand, but also Hitler’s National Socialism on the other. And the one thing that the US progressive democrats and European fascists had in common, if one adheres to the thesis of Karl Polanyi, was that they both reflected a counter-movement by society intended to protect itself against the disintegration of political and economic systems by a market system governed by the principles of liberal capitalism.<sup>53</sup>

A key mechanism for the success of a political force that represents one of the main ideological matrices or hybridisations is, therefore, to be found in the *triangulation* of context, expectations, and mobilisation. To use the economic metaphor, one could also speak of a ‘triangulation of context, demand, and supply’, provided that the recursive character of this triangulation is stipulated. In fact, the context tends to activate or, more simply, to strengthen some popular expectations which, in turn, reward a certain type of politics (i.e., ideological discourse and political communication), namely the one that best matches those expectations. But this political ‘supply’, in the form of political entrepreneurs, parties and leaders, also helps to activate and mobilise this popular demand. No less importantly, politics also contributes to defining the context itself, which can therefore be seen as the ever-provisional objective result of an intersubjective symbolic construction.

Further complexity and dynamism in this framework derive from the observation that any positioning – positive or negative – on a public issue

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53 In Polanyi’s words (1944: 244) “the emerging regimes of fascism, socialism, and the New Deal were similar only in discarding laissez-faire principles”.

is far from being automatically attributed to one or another ideological matrix. An issue that may seem progressive by its 'nature', such as a state-led welfare system for the most disadvantaged social groups, can be 'framed' in progressive, but also conservative and even liberal terms. Since framing involves both selective emphasis on a specific aspect of a theme and selective association with other themes, a conservative framing of welfare policies, such as the 19th-century state conservatism of Metternich and Bismarck, will emphasise protection against the individualising effect of the free market, in the name of interclass harmony and in opposition to growing socialist forces. As such, this framing associates welfare policies with the principle of order, that is, with the maintenance of the existing proprietary regime and social hierarchy.

But the fact that the main welfare institutions in Britain were designed by members of the Liberal Party (Lloyd George in 1911, Lord Beveridge in 1942) does not just suggest a shift of 20th century British liberals towards more progressive and less inegalitarian ideas, as also testified by John Maynard Keynes himself, who belonged to the Liberal Party. In effect, the Liberals' framing of new welfare institutions underscored the positive impact of these measures on British industry, which would become more competitive by reducing worker protection costs for employers and making workers more productive. It is, therefore, by connecting it to the guiding principle of the free market that the welfare state as outlined in the Beveridge Report became acceptable even to non-Labour observers.<sup>54</sup> Similarly, as noted, a pro-environment stance has been susceptible, throughout contemporary history, to a conservative, liberal, and progressive framing, while feminism has typically been framed in either more liberal or more progressive terms.

Yet it would be wrong to think that issues belong to ideologies and that ideologies *own* issues. The only degree of essentialism that we can sociologically accept is that each ideological matrix corresponds to a specific guiding principle (order, freedom, equality). But this constitutive general principle must first be 'decontested', and therefore clarified, in one of its possible meanings (Which order? Which freedom? Which equality?). Then, it must be empirically verified how it applies to possible derivative positions – such as pro-welfare, environmentalist, or feminist – by observing how an issue is

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54 On the arguments used to back the Beveridge Report and reactions to it, see Addison (1977), Barnett (1986).

framed by different ideological actors in a given historical situation. Once the theoretical model has been defined – as I have tried to do throughout this book – it can be used to grasp the fundamental ideological direction that each individual or collective actor takes, whether implicitly or explicitly, when assuming a position on a single issue. Furthermore, ideological directions can be assigned to the cumulative position-takings of an actor on major ‘defining’ issues over a certain period of time, as schematically illustrated in Figure 7.7.

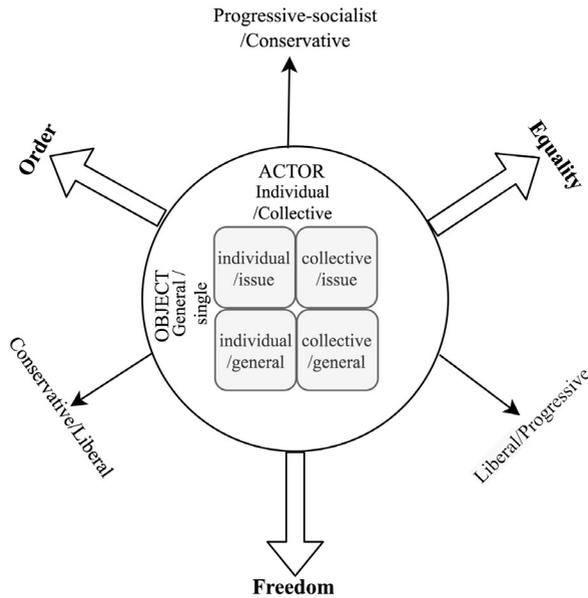


Figure 7.7. Ideological directions

Individual (citizens, politicians) and collective actors (parties, media, civil society organisations, governments) can be assigned directional ideological positions on both single political/policy issues and general political orientations.

As we have seen, there is no single pre-defined research method with which to conduct a study that embraces a theoretical framework based on the ideological matrix approach. Rather than a methodology, this framework is intended to provide an *epistemology* for the study of political ideologies, suggesting where to look for political ideological meanings even when they are not expected to be there, how to recognise the social origin of the

values and interests that they reflect, and how to disentangle them in the historicity of their manifestations, which always tend to involve some concrete application of the guiding principles (or polar stars) in a given field of conflict. By trying to make sociological, philosophical and historical insights constantly interact, this approach has taken a stand against the respective epistemological 'monofocalisms' of sociological currents which deny both the essence (hyper-constructivism) and the importance (hyper-structuralism) of political ideas and their power to structure the symbolic systems of ideological modernity; but also those of a-sociological historical and philosophical approaches that refuse to grasp, on the one hand, social regularities (recurring patterns of historicity), and on the other, the profound dependence of ideas, such as the ideological polar stars of modernity, on the portion of the social universe from which they originate and are more insistently pursued. Finally, this epistemology welcomes the challenge of political science, and of social sciences more generally, which consists in trying to make concepts empirically operational, also those with the highest degree of abstraction, even at the cost of lessening their heuristic and interpretive capacity. I will pursue this strategy further in the next chapter, which provides an exploratory – and necessarily less dynamic – application of the ideological approach to the study of voter choices.



## Chapter 8

### Ideological types and party voting

#### 8.1. A micro-level approach: epistemological and methodological issues

This book has not specifically focused on the micro-level of individual political opinions and voting choices. Its aim has been twofold: (i) to examine the implicit ideological foundations of the positions taken, perhaps under a self-proclaimed pragmatism, by collective social and political actors; and (ii) to identify the objective social positions at the foundations of political ideas that are ideological insofar as they claim to be universalistic and thus fail to grasp their particularism. In other words, the concern has been to reconstruct the fundamental system of ideas to which a given stance can be connected; and the fundamental position in the social space (i.e., the social status but also, much more broadly, the geo-historical contexts) of which a given stance (for instance, a policy decision or opinion) is a typical expression.

When applied to individuals, however, this double search for the idea at the origin of a position and the position at the origin of an idea is not easily practicable using the main tool available in this field of studies, the public opinion survey. A certain epistemological naivety of this method, as far as the study of ideologies is concerned, resides in its claim to obtain from the interviewees explicit information on their ideological orientations. In so doing, on the one hand, it implies an ideological awareness which is not inherent to all people to the same extent, but to some more than others; on the other hand, it creates the devices with which the interviewees are requested to define themselves ideologically. While keeping in mind these epistemological limitations – the assumption of generalised awareness and the effect of methodology on the ideological product – it is nevertheless appropriate to address the theme of ideology at the individual level.

If the position-taking, the stance, the social conduct being studied is voting for a party, one can try to relate it both to a set of fundamental ideas that should constitute the core party ideology, and to the social position associated with those ideas. As regards the former, the analyst relies on voter responses to a set of survey questions concerning social and political attitudes (such as declaring oneself in favour of the death penalty or against raising taxes to improve welfare services). A respondent's 'ideology' will therefore be a methodological construct resulting from his/her positioning on some theoretically central and empirically sound indicators. As for the social position, this is a trivialisation of the complexity of the ideological matrices that simply reduces it to the social status of the interviewee. Indeed, as we have seen, a crucial element is the change over time, as well as across space, in the fortune and meanings of the ideological polar stars. The best data available at the European level, however, would only allow me to analyse the ideological basis of voting from the early 2000s, which is a time frame too short to appreciate this temporal dimension of the social rootedness of ideas.

The starting question is how one can define an ideological disposition at the individual level. Who is an ideological voter? Without entering the logic of the specialised field of electoral behaviour studies, which would consist in controlling the association of ideology with voting for a number of other sociodemographic and political variables and assessing its residual 'effect' all things being equal, it is sufficient to observe, for this book's purposes, if, how, and to what extent the vote for different parties is associated with the three main ideological matrices and their hybrid combinations. More importantly, we shall observe the overall pattern of mutual relations, in terms of proximity and distance, among these positions in the ideological space.

As a reminder, I have already proposed that being ideological involves, in psychosocial terms, having firm beliefs about the state of the world (a 'social ontology') and human nature ('social anthropology'); clear preferences concerning the desirable aims (the polar stars) towards which politics should guide society; and feeling attached to a political group, identifying with it, as well as being disposed to act for it (and in opposition to well-identified political enemies). This is, however, an empirically challenging definition, because the information available in voter studies focuses primarily on their preferences (the second point of the definition) to the detriment of other

elements. Furthermore, while it is always true that operationalising – that is, transforming, abstract concepts into measurable constructs – necessarily entails banalising, this is particularly true with such complex and polysemic concepts as the ideological matrices of political modernity. The solution will be simple and, while certainly less than perfect, it will shed light on one facet of the multidimensional phenomenon of ideology, just as other facets have been addressed with other types of data (macro data, party manifestos, expert surveys, and the like).

Among the elements that make up the above definition, I will retain four central indicators: the intensity of preferences, their internal hierarchy, the vote for a party, and the feeling of closeness to it. In doing so, I isolate different ideological categories of voters which present intense and specifically ordered preferences on the chosen indicators. This will exclude a more or less large portion of voters who do not exhibit ‘ideological’ properties. Indeed, while the study of ideology is broader and encompasses – as observed – the recursive relationship between ideas and positions at both the macro and micro levels, in the case of a voter study one focuses on those citizens who approach to some degree the conservative, liberal and progressive/socialist ideological matrices and their combinations. Adherents of merely metapolitical ideologies or more specific political ideologies that transcend the issues discussed in this book will also be excluded. Hence I will not describe the general profile of a party’s electorate; rather, I will identify the parties around which these voters with almost ‘ideal-typical’ ideological properties tend to gravitate.

I conducted the first of two tests on the European Social Survey (ESS) cumulative dataset, which has covered most European countries since it was first carried out in 2002. In order to have a sufficient variety of political systems and socio-historical contexts without departing from the Western European references used so far, I considered seven European countries in particular: Germany, France, Great Britain, the Netherlands, Sweden, Austria, and Spain (while Italy, another case often cited in the previous pages, is absent from most of the rounds of this survey). I used 8 survey rounds conducted every two years between 2002 and 2016. In this case, the approach was not longitudinal (no major trend would be revealed by the type of analysis conducted); it was only relational and intended to grasp the general system of proximities and differences between ideological types

and party vote. Regarding the ideological indicators, ideally, one should use survey questions that are neither excessively general (e.g. ones about too consensual social values such as freedom, peace, justice, and tolerance), nor too specific (e.g. political issues that refer to markedly national or temporal situations). What serves the analyst's purposes best is therefore a type of mid-range question that addresses voter preferences regarding a society's political goals. However, there are several methodological constraints, the main one being the limited number of questions that not only present these characteristics, but are also repeated in the questionnaires of all 8 survey rounds.

Given these shortcomings, I opted for a mixed solution that uses both single survey questions and indexes made up of several questions. In order to tap into the conservative matrix of order, I applied a scaling technique to a large battery of questions about 'human values' which, while quite general when taken one by one, give a good insight into an individual's dispositions towards political, social, and moral order. Among the numerous questions available, those used to form this index of moral/cultural conservatism were the ones most satisfactory not only for theoretical, but also for empirical reasons; indeed, they belong to the same 'factorial' dimension and present a good internal consistency.<sup>1</sup> The questions asked how much the interviewee considered the following to be "important": (1) "to do what one is told and follow rules"; (2) "to live in secure and safe surroundings"; (3) "that government is strong and ensures safety"; (4) "to behave properly"; (5) "to follow traditions and customs".<sup>2</sup> Although some of these items have also been used by other researchers to construct scales of authoritarianism,

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1 As measured by Cronbach's alpha (0.72 on a 0 to 10 scale for this Index).

2 It is no coincidence that Shalom Schwartz (2003) identified the same items as measuring such value orientations as "conformity", "tradition" and "security", which jointly composed what he called the "higher-order value" of *Conservation*. My index of moral conservatism excludes, however, the overly psychological item "It is important to him/her to be humble and modest. He/she tries not to draw attention to him/herself". More generally, the entire psychological literature that associates ideological orientations with personality traits has not been included in this book. Indeed, my approach views psychological items usually associated with conservatism, such as "uncertainty avoidance" and "intolerance of ambiguity" (Jost et al. 2003), as the effects or, at best, the correlates of more general socially-derived ideological dispositions, and certainly not as their direct causes resting on individual psychological idiosyncrasies or – as these authors term them – "motivational syndromes" (2003: 369).

not only do the latter typically present strong correlations with scales of conservatism,<sup>3</sup> but a fundamental theoretical assumption of the ideological matrix-approach is that a certain disposition towards the principle of authority is constitutive of the conservative matrix of order itself.

The choice is even more limited as regards the indicators for the other two matrices. The liberal matrix, of course, has freedom as its polar star and its roots can be found in the individualisation processes of modernity. However, it would be wrong to think that simple adherence to very general values such as considering it “important to make own decisions and be free” can be a good indicator of the ideological liberal matrix. First, this generic appreciation of liberty has become quite ‘doxic’, that is, taken for granted in contemporary societies (in fact, only 4% of respondents disagreed with this statement!). Secondly, it is a psychological kind of statement that is too disconnected from the spheres of politics and society. Third, it conflates individualism with self-enhancement, while the individualistic nature of the liberal tradition resides in the affirmation of individual rights for all, even for ‘others’: it is, in fact, universalistic.<sup>4</sup> Finally, this statement is correlated, more than with politically meaningful attitudes, with a similar series of psychological dispositions such as hedonism, self-direction and, again, self-enhancement. Indeed, it forms a good index ( $\alpha=0.75$ ) in combination with the following items regarding the respondents’ agreement that it is important “to think new ideas and be creative”; “to try new and different things in life”; “to be successful and that people recognise achievements”; “to be rich, have money and expensive things; to show abilities and be admired”; “to have a good time”; and “to seek adventures and have an exciting life”. But this index measuring a personal tendency towards a certain Dionysian-romantic philosophy proves incapable of discriminating

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- 3 For example, Inglehart and Norris find “strong links” between their two indexes (2019: 71), the first one based on moral approval on issues such as divorce and abortion, the second one measured by the personal importance of security, conformity, and tradition. While the authors call these indexes respectively “social conservatism” and “authoritarian values”, from the perspective of the conservative matrix of order as illustrated in this book there is no appreciable theoretical difference between these two constructs, because they both point to the same set of broader dispositions toward the social world.
- 4 Durkheim (1898) opposed, in reaction to the anti-Dreyfusards who stigmatized pro-Dreyfus intellectuals for their dangerous “individualism”, the modern and essentially liberal individualism of universal human rights to the individualistic selfishness of utilitarian philosophers.

politically:<sup>5</sup> in fact, age (with young respondents scoring clearly higher than the elderly) is by far the factor most closely associated with it.

Among other possible indicators of liberalism, attitudes towards gender equality are, in addition to being theoretically non-conclusive (as noted, feminist positions can be framed on the basis of both liberal and progressive arguments), empirically unusable (the question was absent in 4 out of 8 surveys). As for the question regarding attitudes towards homosexuals, this would identify a more genuinely liberal theme, because their defence, at least when it is not presented in terms of group identity, is consistent with a (liberal) inclination to provide (1) rights to (2) social minorities whose (3) private lives should be (4) guaranteed from (5) discrimination on the part of society and (6) interference by the state. Moreover, considerations of socio-economic inequality do not directly apply to this theme. However, the wording of the question (“Gays and lesbians should be free to live life as they wish”) is so general and un-divisive that voters’ answers are strongly skewed in favour of positive ones (85% of them, equally split between “agree” and “agree strongly”).

While this is suboptimal from a theoretical point of view, because in principle three matrices require three different dimensions, these strict methodological limitations suggest that the best solution is to take an empirical shortcut and use as an indicator of cultural and moral liberalism simply the

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5 This is yet another and more radically different form of individualism, that of romanticism, which emphasized – as described by Simmel (1917: 78-81) – the absolute distinctiveness and uniqueness of an individual who, having attained autonomy from traditional social forces, now wishes to distinguish himself from other individuals, thus giving rise to a new and profoundly inegalitarian form of individualism. While rejecting the decadent side of romanticism, Nietzsche also praised the heroic affirmation of the *Übermensch* in opposition to any mediocre gregariousness and egalitarian conformity. This is the form of individualism that also characterised early fascism (significantly, Mussolini once stated that “Two Mussolinis are fighting in me, one individualist, the other absolutely disciplined”). The thread of this radically inegalitarian individualism extends to a certain type of contemporary radical right ideologues and even voters (who present a slightly but significantly higher average value on this index in the countries considered). Anti-mask protesters during the Covid-19 pandemic are but one of the possible contemporary manifestations of this tendency. In terms of the conceptual framework of this book, these protesters would correspond to a radical L/C ideological type if the Liberal (L) component were defined by this hyper-individualist inclination; this minority type would thus co-exist with the more barycentric radical P/C type in the ideological universe of the radical right.

reverse of the index of moral/cultural conservatism. But while liberalism and conservatism are opposed in this dimension of the political space – I have noted several times that some political ‘matches’, or conflicts, about sociocultural issues essentially take place between the conservative and the liberal matrix – this is not, however, sufficient to correctly identify political positions derived from these matrices. Another fundamental dimension is, in fact, missing. It concerns the legitimacy and the desirability of state intervention to reduce socioeconomic inequalities among citizens. Here the two opposite poles are occupied by (economically) liberal positions, on the one hand, and progressive/socialist positions on the other.

The only viable option in this regard is a variable based on the ESS question that asks if “Government should reduce differences in income levels”. Several elements of interest are condensed in this statement, which raises the themes of (1) the role of the state in the economy and society; (2) social inequalities, (3) from a specifically economic point of view. The most strongly favourable response to this question will serve as the main indicator for a position pertaining to the progressive/socialist matrix. The main drawback of this variable, is, however, the ordinal format of its response set with only 5 positions (from agree strongly to disagree strongly). While this is not problematic in theory, it is so in practical terms because the relatively high percentage (27.4%) of “strong agreement” responses makes it more difficult to work consistently with ‘polar’ ideological positions (e.g. the upper decile), while a 0-10 numeric scale would have made it possible to keep only a smaller percentage of responses placed in extreme positions.

Once the indicators had been identified, I built a ‘classifier’ based on the theoretical framework developed in the previous chapters. What combinations of these two indicators (index of moral/cultural conservatism vs. liberalism, and agreement vs. disagreement on state-led income redistribution) are assigned respectively to a conservative, a liberal, and a progressive position? Again, the practical solutions are a compromise that adapts theoretical considerations to empirical constraints. Ideally, pursuing a polar star implies assigning a very high score to a given political goal. This approach, however, is applied more systematically in the second study (conducted in 2020 – see section 8.3). In the ESS dataset, having to deal with an inverted index (moral liberalism as opposed to moral conservatism) and a skewed

ordinal scale (strong agreement with income distribution), I adopted a symmetric analytic strategy as follows.

Voters were classified as ideologically conservative if they were in the top quintile of the moral conservatism index and in an intermediate position as regards state interventionism in the economy. It is, indeed, a specific property of the liberal matrix to oppose this kind of state interference aimed at alleviating not only inequality, but also poverty. Voters were classified as progressive/socialist if they presented a maximum score on the socioeconomic dimension (that is, the ‘economic left’ of the political science studies that mistakenly oppose it to the ‘economic right’, as if the extreme right were extremely liberal economically), in combination with an intermediate position – i.e. neither extremely high nor extremely low – on the index of moral conservatism versus liberalism. Indeed, it is not a constitutive property of the progressive/socialist matrix to take a stand on such moral/cultural issues, since the conflict on them is fundamentally between liberals and conservatives. Finally – at least as far as the ‘pure’ types are concerned – voters were classified as liberal if they combined a position in the upper quintile of the reverse scale of moral/cultural conservatism with a general disagreement concerning state interventionism in socioeconomic issues.

In addition to the operational definitions of the original matrices, I was also interested in mixed or hybrid types. The principle was, in this case, that a second ‘polar star’ that does not belong to an original matrix adds to its main polar star. Having two goals rather than one, however, the exclusive focus on the original goal is blurred and political identity becomes a sort of ‘interstellar’ fusion of (originally) different ideologies. A first mixed type is liberalism/conservatism, which combines a position hostile to state-interventionism with moral/cultural conservatism. As shown, this is often erroneously conflated with conservatism *tout-court*, instead of being understood as an ideological hybridisation of two distinct matrices with growing political success over the course of the 20th century. Another mixed type is socialism/conservatism, which, by combining maximum agreement on state interventionism with placement in the conservative top quintile is particularly devoted to the rather materialistic priorities of defending lower incomes and order/security/tradition. This ideological positioning should be of particular interest with regard to a significant part of the contemporary radical right, and it has a historical antecedent in the socialist revolutionary

tendencies which were present in the genetic phase of fascism and National-Socialism; but also, as far as the progressive/socialist matrix is concerned, in the moral/cultural order pursued by Stalin's Soviet Union (within the framework of a metapolitical totalitarian system) and other Soviet satellite states, especially until the early 1970s.<sup>6</sup> A final mixed type is progressivism/liberalism, which values both socioeconomic equality (strong agreement) and moral/cultural liberalism (top quintile) at the highest levels. In this case too, two polar stars – equality and freedom – coexist in the ideological galaxy of voters, who – like some liberal-progressive parties of the 1990s – can, in fact, adhere to one much more than the other. Above and beyond these typical classes, indeed, there are always other possible intermediate combinations that correspond to more liberal than progressive liberal-progressive hybridisations, or vice versa (see also Figure 8.4 in this chapter).

## 8.2. Analysing ideological voters in seven European countries in the 21st century

Since the relational logic of matrices also implies a classificatory approach, it was therefore in classes, and not in a continuous space, that I divided the statistical population. Rather than looking at the statistical power of a predictor on the outcome variable, I was interested in mapping the system of relations between groups that structures the political ideological field. The construction of these classes was based on a decisive criterion inspired by a polar star-approach: the intensity (or lack of intensity) of a voter's position on a political goal. Unlike most political science models, which place voters in a space described by two predefined continuous dimensions (e.g. economic left and right, cultural liberalism vs. authoritarianism),<sup>7</sup> this approach incorporates the salience of a political goal in the eyes of a voter, so that only the 'ideologues' are isolated in the model, and their ideology is

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6 Interestingly, the centrifugal move that characterized advanced industrial societies in the late 1960s and 1970s also affected these regimes, as manifested by the promotion of "sexual freedom" by Honecker's German Democratic Republic, which not only legalised divorce and abortion, but also actively recommended contraception (the pill and condoms sold by vending machines).

7 See, among the most interesting recent examples, Hutter and Kriesi (2019); Norris and Inglehart (2019); De Sio and Lachat (2020).

captured by the ‘polar’ nature of their preferences; the result is a map of the empirical interconnections among different ideological types of voters which never loses sight of the ‘barycentric’ position.

Applying the operational definitions developed above, I transformed quantitative variables based on continuous or ordinal distributions into qualitative categorical categories, i.e. classes or types. What would be equivalent to ‘losing information’ in the logic of a continuous space was, on the contrary, to make some information – such as that relating to the qualitative fact of being an individual who places himself or herself on a pole of an axis – particularly meaningful on theoretical grounds. It is this qualitative information that is, in fact, lost when the (collective) mean of a distribution is pursued. What I obtained was the distribution presented in Appendix Table 1. The statistical population consisted of all the respondents who (1) indicated the party that they voted for in the last general elections in their country between 2002 and 2016; (2) matched one of the six ideological classes as defined above; and (3) stated that they felt close to a party.<sup>8</sup> The proportion of the population is 25.03% of voters, which meant that a quarter of the electorate can be considered ‘ideological’ according to the principles of intensity and the six political ideological orientations of interest. The prevalence of two groups can be observed: those that ranked high for income distribution and intermediate for moral conservatism (progressive/socialist group); and those with a high level of moral conservatism and intermediate income distribution (conservatives). Smaller classes consist of respondents who opposed greater socio-economic equality, whether they also opposed traditional values (liberal group) or cherished them (liberal/conservative).<sup>9</sup>

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8 When all party voters, close to a party or not, are kept in the analysis, the population rises to 25,629 cases (39.03% of all voters). The results of the following analyses do not change substantially, but the overall correspondence between ideology and vote is less consistent, since those who do not develop identifications with political groups such as a party are not, according to the previous definition, typically ideological. Proximity to a party is thus used here as a proxy for this affective/identity-related element that helps to define an individual ideological disposition.

9 The relative magnitude of the different classes, however, is not particularly informative *per se*, not only because it is partly a methodological by-product of the specific questions used and their formulation, their response sets and the cutting points used to construct the classes; but above all because, once again, their relations with the classes of party voters are of more central importance.



the marginal (i.e. general) distribution: also given the high number of cases (voters), some Labour and Social-Democratic parties (Labour, SPD, PvdA) tend to be barycentric and thus coincide with the ideological positions more widespread among voters in these seven countries altogether.

However, the direction with respect to the axes is also meaningful: British Labour ideological voters tend to be barycentric when it comes to income redistribution, but they are slightly more likely to favour moral traditionalism than the average, while German Social-Democrats are, on the contrary, slightly more liberal, given their position below zero on the vertical axis. Large parties generally tend to be closer to the barycentre because they contribute, with their large numbers, to defining it, and because the correspondence analysis technique weights more those cases that are relatively rarer. But this fact does not prevent some large parties from moving away from barycentric positions, such as the French PS, which is more markedly on the left (since French respondents tend to be on average more in favour of state interventionism than most other European cases, as shown by country labels); or the Spanish PP, more clearly at the higher pole of moral conservatism (with the Spaniards being in general the most traditionally oriented among the electorates considered).<sup>11</sup> This also suggests that inter-party, intra-country direct comparisons are to be preferred: the position of the French Front National regarding order, equality and freedom is close to that of the Austrian Social-Democrats (SPO), but it is clearly quite distant, in the national ideological space, from that of the French Socialists (PS). Finally, and more precisely, comparisons between two parties should not be made on the basis of their direct distance (that is, the imaginary segment that connects their two points), but on the basis of the respective distances from the centre of the two axes.

Given these methodological premises, what substantial results does one obtain from this graph? Indeed, rather than focusing on minor gaps such as those observed in the example above, one notes that the main deviations from the Western European ideological barycentre are those of liberalism/progressivism (L/P) and liberalism (L) on both dimensions, while conservatism/liberalism (C/L) deviates only on the horizontal dimension. The

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11 Countries are entered into the multiple correspondence analysis as “supplementary” variables which, as such, do not affect the MCA solution, while their categories are mapped into the solution space.

socialist/conservative position (P/C) is also more ‘ordinary’, in the sense that it is closer to the ideological conventional wisdom of most European voters, although its adherents are not very numerous (they are as many as those of the L/P class). But it is around the two main ideological poles of contemporary politics, progressivism/socialism (P) and conservatism (C), that one would expect to find the mainstream European parties.

In proximity to the conservative type (C), which is defined by a high moral traditionalism and an intermediate position on the role of the state in the economy, we find the conservative Austrian People’s Party (OVP), the French *Républicains*, the Dutch Christian Democratic Appeal (CDA), the German CDU (Christian Democratic Union) and, somewhat less predictably, the Swedish Centerpartiet.<sup>12</sup> But it is significant that here we also find Geert Wilders’ Party for Freedom, typically classified as a radical-right party (but still Dutch, and thus culturally less conservative than others), as well as the nationalist Sweden Democrats. As for the British Conservatives (Tories), they are the most economically liberal of the mainstream conservative parties, along with the Swedish *Moderata*, which, although more typically conservative in the early 20th century, gave rise from the 1930s to the Nordic model of liberal conservatism in opposition to the long-standing hegemonic Swedish Social-Democrats and their welfare State model.

On the traditionalist dimension, two other parties that were often on the far right of the political spectrum in the 2000s, the Freedom Party of Austria (FPÖ) and Le Pen’s Front National (FN), do not differ significantly – if limited to these essential political goals – from the average voter (as we shall see, their distinctiveness is political on a specific issue – immigration – and metapolitical for other aspects). Remarkably, as we have noted, the overall profiles of their voters do not differ significantly even from those of some large Social-Democratic parties such as the Swedish Social Democratic Party (SSDP) and the Social Democratic Party of Austria (SPÖ), which tend to be culturally quite conservative without being strongly egalitarian from a socioeconomic point of view.

In the Progressive type (P), the Spanish Socialist Party (PSOE) and, slightly more egalitarian, the German Die Linke (former PDS), but also

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12 While it was born as an Agrarian party, its following developments should place it closer to the L position, also given its more recent belonging to the Alliance of Liberals and Democrats for Europe and the Renew Europe parliamentary group.

the French Socialist Party (PS) come close to a more prototypical progressive position (redistributionist and neither traditionalist nor liberal), while the German, British and Dutch Social-Democratic and Labour voters are quite barycentric in terms of economic egalitarianism. The Dutch Socialist Party (SP) (smaller and more radical than the PvdA) approaches a position that combines the polar stars of cultural freedom and socioeconomic equality. This combination, however, is best exemplified by the Swedish Left Party, the French Front de Gauche (FdG), and the Spanish United Left (Izquierda Unida). The Green parties also gravitate around this pole of progressivism/liberalism: at increasing levels of liberalism, we find the Swedish Greens (Gröna), the French Greens (Verts) and then, much more distinctly, the Dutch (GroenLinks), Austrian (Grüne), and German (Grünen) Greens. Finally, four parties lean towards the liberal (L) area: the British Liberal Democrats (the least liberal in all dimensions), the German Free Democratic Party (FDP), but even more so the two Dutch parties Democrats 66 and, economically more much more liberal, the People's Party for Freedom and Democracy (VVD). The Swedish Liberalerna are closer instead to the liberal-conservative type.

The discrete position of each single party, however, does not do justice to the overall consistency of the Western European ideological field applied to party politics. If we regroup the parties according to their traditional families (and their sometimes merely descriptive labels),<sup>13</sup> we obtain a noticeable overlap of the ideological types and the party vote in the predicted direction (Figure 8.2): Social-Democratic and Labour parties match the Progressive type; Liberal parties the Liberal type; and Conservative/Christian Democratic parties the Conservative type (with a deviation towards the Liberal/Conservative type).<sup>14</sup> Moreover, the radical right entirely matches the Conservative/Socialist type (at least until other more distinctive ideological elements are included).<sup>15</sup> Overall, the parties of the radical left are close to the

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13 See Appendix Table 3 for the internal composition of the party families.

14 Although both are located to the right of the vertical axis, this does not mean that they are both economically liberal. Given the generalised bias in favour of state interventionism in the ESS surveys, a position not markedly to the right of the vertical axis (such as that of the Conservative class) simply means that they are less in favour than the barycentric position.

15 It is worth noting, however, that when voters who do not feel close to the parties are considered, the position of radical right party voters not only becomes less radical as

Liberal/Progressive type, shared with the Green parties, which tend, however, much more towards the hyper-Liberal bottom of the vertical axis.

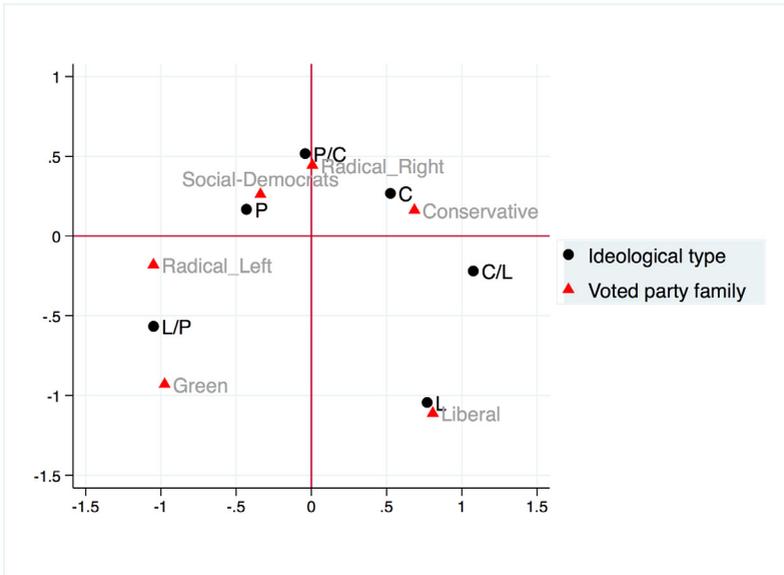


Figure 8.2: System of relations (proximities and differences) between ideological types and votes for party families in 7 European countries in the 21st century (dataset: European Social Survey, rounds 1-8). Note: correspondence analysis: the two axes do not *a priori* represent two specific dimensions of the political space.

The (provisional) lessons to be drawn from this overall picture appear to be clear. In the first place, when the ideological field is reduced to its essential terms – the fundamental alternatives that have structured the political space for centuries – ideologies and parties are linked by a system of consistent relations, at least among a minority of more ideological voters (ca. 25%).<sup>16</sup> Second, when the positions in this ideological field are defined

regards the polar star of order, but even surpasses on the left, albeit very slightly, the voters of Social-Democratic parties considered as a whole. This reminds us that in the electorate of radical parties there is a fraction of the former ‘working class’ which has gradually defected, sometimes even since the 1980s, from progressive parties that no longer pursued economic redistribution.

16 It is important to bear in mind that what we have graphed is not a picture of the ideological profile of the typical voters of each party, but a system of relations between ideological classes and parties, with the exclusion of most voters.

by dynamic patterns of order, liberty, and equality, the voters of the radical right parties tend, on the whole, to locate themselves in a position that is only slightly more pro-order than that of conservative parties, and only slightly less pro-equality than that of progressive parties. In other words, they fit into the hybrid type of conservatism/socialism. Thirdly, the liberal matrix continues to structure the ideological space in a decisive way, whether it is to offer a distinctive class to the voters of the Liberal-Democratic parties; provide a political horizon (other than environmentalism) to the voters of the Green parties; differentiate the voters of the ‘New Left’ from those of the traditional Social-Democratic parties; and constitute a negative point of reference, not very dissimilarly from two hundred years ago, for the self-positioning of the ‘ultra-conservatives’.

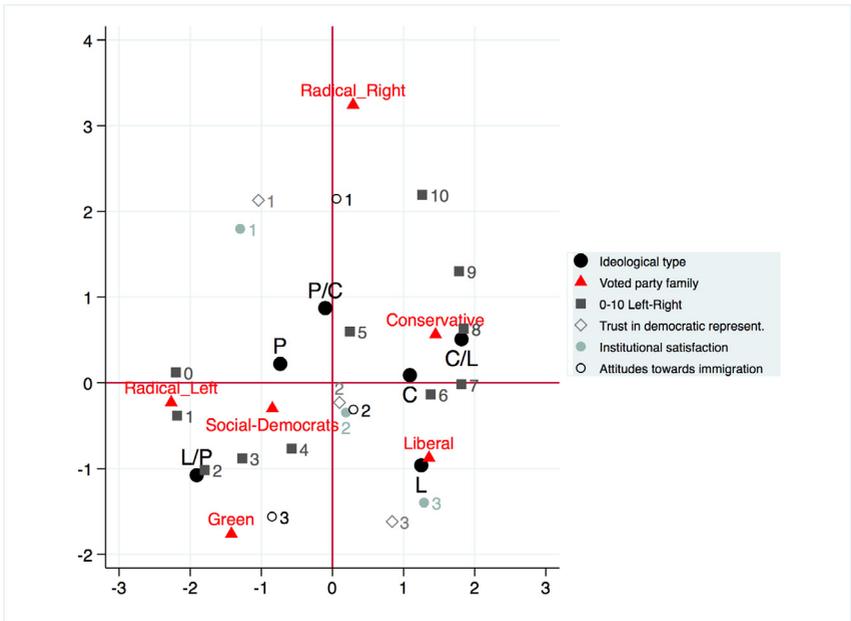


Figure 8.3. System of relations (proximities and differences) among ideological types, votes for party family, left-right self-placement, trust in democratic representation, institutional satisfaction and attitudes towards immigration in 7 European countries in the 21st century (dataset: European Social Survey, rounds 1-8). Note: Multiple correspondence analysis.

These findings do not depict the distinctive ideological identity of each party family, and even less of each party; on the contrary, they point to elements of relative similarity, convergence or reciprocal influence. The specificity of the Greens obviously remains the environmental issue, for instance, yet it is important to relate their emergence to the centrifugal countermovement of Western societies which began in the late 1960s and gave rise, starting from the 1980s, to the New Left and the liberal hybridisation of progressivism in the partisan ideological field. The radical right is another phenomenon that must be grasped by adding different dimensions of political and metapolitical conflict. On adding the left/right axis, one certainly better appreciates the distinctiveness of this party family in the ideological space. As Figure 8.3 shows, the radical right parties depart from the barycentre in the direction of the extreme right (position 10 on a 0-10 left-right axis based on the respondents' self-placement). However, they locate themselves, more precisely, between the class of conservatism/socialism (P/C), which thus remains the ideological point of reference, and the extreme right. Second, the meaning of self-positioning on the extreme pole of the left-right axis is not self-explanatory and needs to be further elucidated. Third, other fundamental attitudes *vis-à-vis* political institutions contribute to defining the identity of these parties.

More generally, radical right party voters tend to profoundly diverge from the ideological barycentre in a set of not only political, but also – and more fundamentally – metapolitical attitudes: in fact, they involve first of all radicalism itself, that is, a disposition to take extreme positions (as evidenced by the fact of choosing the last degree of the axis); this has historically been associated, as noted in previous chapters, with an inclination towards both radical styles and methods in politics (both on the progressive/socialist and conservative sides). But the metapolitical dimension of the radical right voters (which is metapolitical in that it tends to be empirically shared by the voters of the radical left) is best captured by examining their affective relations with political institutions, and in particular their (lowest) levels of trust and satisfaction.

More precisely, when some indicators of distrust in democratic representative institutions (as symbolised by the parliament, politicians and political parties of their country) and political dissatisfaction (including the national government, the current state of the economy, the way in which

democracy works, the state of the country's education system and health services) are included in the analysis, the specificity of the radical right voters emerges more clearly: they are, in fact, the most distrustful of the institutions of parliamentary democracy, as well as the most dissatisfied with the institutional performance of their country.<sup>17</sup> Indeed, these are the most authentic (metapolitical) ideological roots of any populism, which primarily questions by whom, how, and with what degree of people's influence political power should be exercised. As such, it always tends to blame representative institutions and the quality of their action in the absence of a sufficient degree of more direct popular sovereignty.<sup>18</sup>

There are good sociological reasons, however, for both institutional distrust and political dissatisfaction, which cannot therefore be considered as the ultimate causes of populism, including that of many radical right voters. More granular analyses show, in fact, a clear association between these negative metapolitical attitudes towards the political establishment and both the objective and subjective positions of voters in the social space as captured, in the most general way, by the (self-reported) levels of income and education, or their self-perceived economic situation. Without multiplying the – potentially infinite – number of figures and tables presented, suffice it to say that the lowest 'quintile' in terms of (cumulative) trust and satisfaction rises to 46% among those who feel that living on their household's income is "very difficult" at that time, while it diminishes to 12%

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17 These variables were constructed using other questions included in the ESS dataset. The Index of Distrust in Representative Institutions (Cronbach's alpha= 0.89) sums the following three variables: Trust in country's parliament, Trust in politicians, Trust in political parties; the Index of Political Dissatisfaction (Cronbach's alpha= 0.78) brings together the following five variables: How satisfied with present state of economy in country; How satisfied with the national government; How satisfied with the way democracy works in country; State of education in country nowadays; State of health services in country nowadays. These two indices are, in turn, strongly correlated with each other and could give rise to a single index of trust and satisfaction. For purposes of conceptual clarity, however, I analysed them separately. In both cases, the classes were numbered as follows: 1=low; 2=middle; 3=high.

18 The populist dimension of the discourse of radical right parties stems from a more structural erosion of confidence in institutions – a decline that Dogan (2005: 13) defined as "chronic and international" – and from a growth of political mistrust that has been well documented at least since the 1980s.

among those “living comfortably” on it.<sup>19</sup> But even when one considers a less ‘emotional’ variable such as, simply, income, the percentage of highly dissatisfied and distrustful voters is 28.6% in the lowest income quintile and 13.4% in the top quintile.

It would therefore be a symptom of naive idealism – in the sense of attributing to the realm of ideas a life detached from that which takes place within real society – or of outdated postmodernism to overlook the fact that economic living conditions are a powerful generator of perceptions, preferences and assessments of the social and political world. And it is primarily in the areas of the social universe where economic deprivation is highest that the metapolitical polar star of populism – popular sovereignty – shines the brightest. But it would, of course, be a form of economic reductionism to assume that this phenomenon only depends on income, since many other social variables, but also social factors that simply were not collected in the survey, concur in defining the social position from which a certain idea is more or less visible, more or less attractive. A voter’s level of education is probably the most typical example, even if it is less discriminating in the cases of trust and satisfaction, of which the lowest quintile increases from 16% to 24% when moving from the lowest education quintile to the highest one. It is, in fact, on issues such as immigration or homosexuality that the structure of opinions depends much more on ‘cultural capital’ measured by education levels.

Finally, to complete the essential ideological profile of the radical right, the immigration issue must obviously also be considered. The voters of these parties are closest to the anti-immigrant class, which consists of the lowest quintile of an Index of attitudes towards immigrants.<sup>20</sup> However, this issue does not introduce a truly new element in terms of political ideologies. As noted earlier (Chapter 3), the focus on protecting a native community from potential threats posed by any out-group, especially a low-status foreign one, is a derivation of the matrix of order. Not only is this negative

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19 This ESS question reports the respondent’s “Feeling about household’s income nowadays” on a four-step ordinal scale (Very difficult, Difficult, Coping, Living comfortably on present income).

20 The Index of Attitudes towards Immigration (Cronbach’s alpha=0.85) includes the following three questions from the ESS dataset: Immigration is bad or good for country’s economy; Country’s cultural life undermined or enriched by immigrants; Immigrants make country worse or better place to live).

disposition towards immigrants logically and historically consistent with this ideologically conservative matrix, it is also so from an empirical viewpoint: on the one hand, the anti-immigrant class is an extension of the ideological class of conservatism/socialism (which values both moral traditionalism and income redistribution) on the vertical axis. On the other, the Greens, the party family that gravitates close to the ideological class of liberalism/progressivism (but with a clear liberal slant, given their position at the bottom of the vertical axis),<sup>21</sup> are also closest to the top pro-immigrant quintile. The theme of immigration, in other words, radicalises the originally dichotomous opposition between the liberal and conservative matrices, while it is not distinctive of the progressive/socialist matrix. And it radicalises the liberal/conservative dichotomy by strongly interacting, once again, with the social position of the voter, in terms of both education and income: from the highest to the lowest quintile of education, the top anti-immigrant quintile rises from 13.5% to 32.5%, while from the highest to the lowest income quintile it rises from 13.4% to 28.7%.<sup>22</sup>

A similar observation about the self-sufficiency of the original matrices could be made, incidentally, about another issue that is often mentioned as decisive for the ideological identity of the radical right parties, namely Euroscepticism. The hostility towards the European Union, indeed, does not require the definition of a special ideological matrix: it can in fact be traced back to an extension of institutional distrust and political dissatisfaction from the national level to that of the EU (which generates metapolitical anti-liberalism, that is, hostility towards the institutions of representative liberal democracy); and partly also to the fundamental adherence of the EU, as an ongoing institutional project, to political and economic principles that draw on the liberal matrix (which gives rise to political anti-liberalism and therefore, as in previous historical manifestations, to revolutionary conservatism or radical conservative/socialist hybridisations).

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21 If the focus was the party electorate rather than its ideological fraction, the Greens' position would be mapped in an intermediate position between the liberal/progressive (L/P) and the liberal (L) ideological types.

22 While these observational results are based on simple cross-tabulations on voters of the seven countries altogether, OLS regressions with standard errors clustered on countries clearly show that both education and income have a strong linear association with the dependent variable (Index of attitudes towards Immigration), with education significantly stronger than income.

This dataset also offers a unique opportunity to test the extent to which common-sense assumptions about the social ideal types that best embody an ideological class – e.g. the cliché of ‘lords’ and ‘grocers’ as typical conservative supporters in late 19th century England – are empirically well founded. Since information on the respondent’s specific type of employment is available for more than 20,000 voters over 15 years, one can obtain evidence of professions that are over-represented, and therefore more typical, for each ideological class (original and hybrid).<sup>23</sup> In the class of conservatism (C), what one finds in higher proportions than in the other classes are small traders (butchers and fishmongers, breeders, beauticians, tailors), law enforcement professionals (police officers, armed forces), but also bank cashiers and tellers, plumbers, and shop supervisors. It is in the class of conservatism/liberalism (C/L) that one finds higher status professions such as those of directors and chief executives; managers of small enterprises in manufacturing; but also primary education teaching professionals and agricultural and fishery labourers. In the class of liberalism (L): liberal professionals such as lawyers and other legal professionals, doctors, architects, engineers; sales and marketing managers, business professionals, economists, advertisers, IT/digital professionals. In the class of progressivism (P): manual workers such as metallurgical and steel workers, miners, bricklayers, construction workers, weaving and knitting machine operators; social workers such as elementary teachers and home-based personal care workers; civil engineering technicians and chemical engineers; office clerks, cashiers, insurance representatives, shop assistants, railway operators. In the class of conservatism/socialism (P/C): other manual workers such as concrete placers, sheet-metal workers and casters, welders and flame cutters; garbage collectors; doorkeepers and watchpersons; domestic helpers; shoe-makers, furriers and sewers; farm-hands and labourers. In the class of liberalism/progressivism (L/P): university lecturers and human scientists, high school teachers, pre-primary education teachers; social work professionals; art, entertainment and information professionals; IT and digital professions (creatives, designers, computer assistants, data entry operators), and ecological professions (botanists, zoologists, forestry labourers).

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23 In this exploratory analysis, a profession was considered as being over-represented in an ideological category when the proportion of their respondents exceeded the mean value by at least 15 percentage points based on a minimum of 60 observations.

This inventory of jobs more typically associated with the ideological classes is certainly not intended to revive class voting as a decisive explanatory model of electoral behaviour.<sup>24</sup> Rather, it helps to associate the logic and principles of the ideological matrices of modernity with very concrete social positions, each of these being characterised by a certain combination of income, education, but also sphere of the social world, social prestige, upwards or downwards perspectives, and other empirically non-measurable social factors that always concur, however, to shape the ideological orientation of an individual. Specific social/anthropological beliefs about the essential nature or the current state of the social world can develop more or less easily according to the type of position occupied, including employment. The same is true for the development of modes of perceiving society and politics, but also one's own interests, preferences, and affective dispositions towards both.

And there is no reason why the new jobs of contemporary 'digital' societies should be excluded from this framework derived from the ideologies of modernity: from delivery riders seeking greater socioeconomic rights, to the *rentier* logic of owners of properties and apartments advertised on short-term rental platforms, to the entrepreneurial principles of start-uppers and new creatives: specific combinations of interests and values always involve, to some extent, a triangulation of order, liberty, and equality. And while new manifestations of these principles and new forms of advocacy and intermediation arise, as in the case of precariat and non-unionised types of occupational status, these transformations do not necessarily require a paradigm shift that exits the political and economic logic of modernity; in fact, this shift has not occurred so far.

As noted several times, however, this micro-sociology of ideology is only one piece of the whole puzzle, which must take into account more macro factors related to the structure of a local or national society, and the cultural factor of the *Zeitgeist*, the time-related consensus on what is thinkable and

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24 As an article in the 2020 issue of the *Annual Review of Sociology* argues, the role of class position (articulated, for instance, into manual workers, sociocultural professionals, service workers and managers/business professionals) in shaping political opinion is likely stronger than in guiding voting behaviour. Rather than the erosion of social class identities, in fact, the decline in class voting has its causes on the supply side, namely in the unresponsiveness of mainstream parties to the working- and lower-middle-classes (Lindh and McCall 2020).

doable, or even common sense, at a certain time in a given cultural area of the world. But it is not in this section devoted to survey-based voter studies that these factors become more visible. In fact, if one considers the different ESS rounds that cover more than 15 years since 2002, what clearly emerges is the remarkable stability of the structure of the relations between ideologies and voting, with spatial distributions always very similar in the different maps.<sup>25</sup> In the next empirical test reported, I extended the analysis to more recent times – 2020, after the first wave of the Covid-19 pandemic<sup>26</sup> – and with the inclusion of Italian parties. Perhaps more importantly, an alternative approach to operationalising the ideological matrices was tested.

### 8.3. Outlining a polar-star approach to the study of voter party/ideology interconnections

In order to more closely reflect a polar-star approach to the study of ideologies, I present the results of a study conducted on the “ultimate goal of politics” in five countries (United Kingdom, the Netherlands, Germany, France, and Italy) in 2020.<sup>27</sup> The study, in fact, was conceived as a test of the

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25 Small changes could also be determined by the fact that some radical right parties (PVV, Sweden Democrats) were absent in the first rounds and Austria was absent in the intermediate rounds (4,5,6). For these reasons, these very similar maps over time are not published.

26 The specific temporal context of the survey (end of July 2020) may have affected the marginal distributions of responses to some questions, but there is no reason to assume a specific cross-sectional impact at the level of the relationship among variables.

27 CAWI survey conceived by Pomlab (Public Opinion and Media Lab) within the University of Milan and commissioned from Demetra ([www.demetra.com/en](http://www.demetra.com/en)). The survey was conducted at the end of July 2020 in the five countries mentioned above (UK, NL, DE, FR, IT) on 5,265 respondents selected within the online community of the company on the basis of quotas by gender, age, and geographic area. An additional filter was applied to the selection of respondents based on whether they voted in the last general election and revealed the party they had voted for. Given that the universe of reference of this survey was that of party voters, within which a subgroup of ideological voters would then be extracted, the aim was to maximize the number of respondents for whom this preliminary information was available. The relational logic of the cross-sectional level of analysis did not make the perfect representativeness of the sample with respect to the national population a primary objective. The relatively short questionnaire was administered as a specific survey (i.e. not incorporated into larger survey questionnaires) and respondents were required to comply with strict quality standards (e.g.

‘three-matrix’ (and thus multidimensional) perspective on ideologies developed in this book, and it will provide a first exploratory example of how the ideological field can be operationalised according to this logic.

A specific battery of questions referred to the fact that “people have different ideas about the most important goals towards which politics should lead society”: for each goal listed, the interviewees were asked to indicate how important it was to them.<sup>28</sup> With a variety of items available, it is preferable to maintain an inductive perspective on which goals and issues may represent better manifestations of the ideological matrices today and in different countries. For this reason, selected for each matrix were those indicators that had emerged as belonging to the same factorial dimension. For the conservative matrix, in all 5 countries the following four items were systematically the most highly intercorrelated on the basis of country-specific factor analyses: “Affirming order, authority and security in everyday life in [country]”; “Protecting the family and traditional morality”; “Defending private property and private assets”; and “Protecting the nation and the interests of the [name of national population]”. Taken together, these items constitute an index of conservatism as an ideological matrix associated with the principles of political, moral, and social order. For the progressive/socialist matrix, two items constantly showed a strong intercorrelation in the five countries: “Dramatically reducing income differences among people” and “Assisting citizens in need by increasing taxes for the wealthiest”. In order to create statistically more satisfactory indexes, however, a third item was added for two countries (France and Italy): “Protect jobs nationwide, also by prohibiting layoffs”.<sup>29</sup> Finally, for the liberal matrix, one item – “Guaranteeing equal rights to homosexual couples” – was used for all countries as the pivot of a third dimension that was formed in most cases by the association with “Establishing true equality between men and women”. To maximise the reliability of the indexes, added were one or more

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anti-cheat strategies were implemented). The average time needed by the interviewees to complete the questionnaire was 6 minutes.

- 28 “For each of the following goals, please indicate whether or not it matters to you: Indicate a position between 1 and 7, where 1 means that it is not important to you at all and 7 means that it is very important to you”.
- 29 This third item, which in the other countries did not necessarily strengthen the index obtained, was necessary in these two countries to fulfil the minimum requirement pursued in the construction of these indexes: a Cronbach’s alpha higher than 0.7.

of the following items when, according to the cultural specificity of the country, they proved to be part of the same ‘liberal’ dimension: “Complete freedom for each individual to make decisions regarding his or her own life”; “Complete freedom for each individual to publicly express any idea”; “Safeguarding the Earth’s environment, at any cost”; “Guaranteeing full rights to ethnic minorities and immigrants”.<sup>30</sup>

What these items have in common, from a theoretical point of view, is their reference to rights that do not have a specific socioeconomic nature. Of course, most of these items are not exclusive to a liberal perspective. Some of them, such as those referring to individual freedom rights, have almost attained the ‘doxic’ status of principles which – contrary to current authoritarian states – can be taken for granted in European Western societies. As such, they are generally shared by conservative and progressive citizens because of a typical process of ‘interstellar hybridisation’. Other objectives may refer to both individual and group rights and may also have a socio-economic dimension (gender equality). In fact, none of these items and indexes would be enough to classify a respondent as closer to the conservative, progressive, or liberal matrix, or to a hybrid type. And this is also the reason why ideologies should not be studied in isolation, but always in relational terms.

To finalise the ideological classes of interest, one must look not only at how much individual praise liberal goals, but also whether they praise these goals more than others (conservative or progressive). If ideological types are defined by the polar stars that they pursue, this does not exclude the recognition of the relative importance of different political goals and social values; only some of these, however, will be identified as the ‘polar stars’ of a voter endowed with ideological orientations. For instance, defending women’s rights can be a progressive goal, and it is so when it is shared by someone who also praises socioeconomic equality, thus giving a progressive/socialist slant to gender equality (in terms of equal rights or equal income in the labour market, for example, or reliance on a welfare-based childcare system). But defending women’s rights can even be an

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30 The national indexes of liberalism were constituted as follows: NL: homosex, women, freedom\_life, freedom\_ideas; UK: homosex, women, minorities; DE: homosex, women, environment; FR: homosex, women, environment and a fourth item, which reflected the peculiar ‘republican’ slant of French cultural liberalism: “Ensuring free public education for all, including at university”; IT: homosex, women, minorities.

‘ultraconservative’ and nativist cultural goal, for example when brandished in opposition to Muslim minorities. A more typically liberal interpretation of this goal would emerge, however, from its – relational – status as a ‘polar star’ for those respondents who do not value, or do not value with the same intensity, conservative and progressive goals. The deeply relational nature of ideological definitions and classifications can be visually depicted as in Figure 8.4.

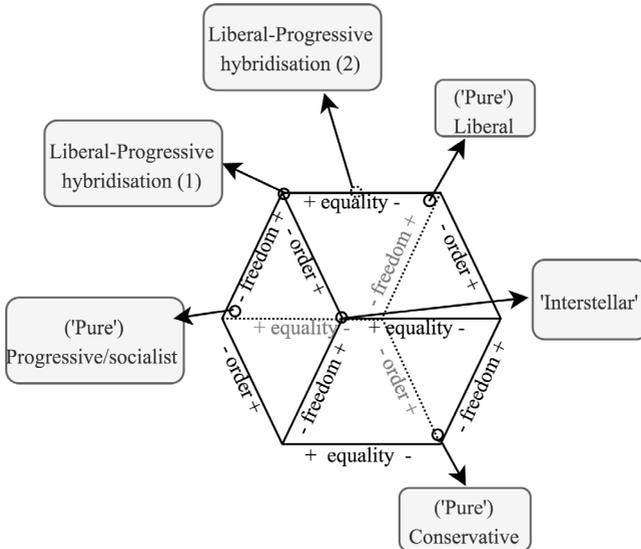


Figure 8.4. Ideological dimensions and their relations

An actor’s position with respect to the three polar stars can be represented on a tridimensional ideological space. Each dimension reflects the subjective salience of an ideological goal (equality, freedom, or order) for an actor. A polar star corresponds empirically to a maximum degree of salience attributed to a given goal. Ideological types (such as liberal, conservative or progressive-socialist) result from the structure of the relations among these goals (e.g.: for a liberal, the salience of freedom is both maximum and substantially greater than that of equality and order). Hybrid types identify a great variety of possible combinations, such as Liberal-Progressive (1) and (2), the latter leaning more towards the liberal than the progressive pole.

Operationally, the ideological classes were constructed with the same method as in the previous study, but with a higher possibility for articulation allowed by the combination of three distinct indexes with positive polarities. Therefore, the conservative class was based on the maximum levels (upper

deciles) on the index of cultural traditionalism and on lower levels on the progressive and liberal ones; the same logic of the ‘unique’ polar star was applied to the construction of the other two original matrices. As regards the mixed classes, these tended to combine two polar stars with the exclusion of a third set of values.<sup>31</sup> The distribution of observations for each class and political party are shown in Appendix Tables 4 and 5. In the absence of a measure of proximity to the party, all respondents who fell into one of the six classes (38.77% of voters) were included in the statistical population.<sup>32</sup>

When the system of relations between ideological types and party votes is mapped, the resulting pattern (Figure 8.5) is very similar to the one obtained using different data, variables, years and, in part, different countries and parties. But what matters, also in this case, is the relative position of each party with respect to the angle formed by the two axes, as compared with the distance of other parties or ideological types from the same angle. Given that, in this case, the horizontal axis tends to coincide with the cultural dimension, the most distant ideological party voters are those, on the one side, of the Italian radical left (*Sinistra*, made up of “Free and Equal” – LEU – and Communist Refoundation – PRC), and on the other, the Italian radical right populists of Matteo Salvini’s League, together with the national

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31 In the simplest case, a polar star-approach to the construction of ideological classes entails the use of three variables – it could just be three questions, such as those regarding the subjective importance of order, authority and security (Order=O), gay rights (Liberty=L), and income equality (Equality=E) – which symbolise the three matrices. Given that responses to these questions were ordered on a 1-7 scale of importance, the classes were computed as follows: Conservatism:  $O=7 \ \& \ E<7 \ \& \ L<7$ ; Progressivism/socialism (P):  $O<7 \ \& \ E<7 \ \& \ L=7$ ; Liberalism (L):  $O<7 \ \& \ E<7 \ \& \ L=7$ ; Conservatism/Socialism (C/P):  $O=7 \ \& \ E=7 \ \& \ L<7$ ; Liberalism/Progressivism (L/):  $O<7 \ \& \ E=7 \ \& \ L=7$ ; Conservatism/Liberalism (C/L):  $O=7 \ \& \ E<7 \ \& \ L=7$ . This simple rule provides good results in terms of relations between ideological classes and party voting. However, having chosen a more inductive approach, in which the relevant variables are defined by country-specific factor analyses, we had thirty deciles overall (ten for each index) that were combined into ideological classes using the first deciles or two deciles, depending on the number of cases available for each class. The assumption of having identical thresholds is therefore relaxed on empirical grounds.

32 As shown in the case of the ESS study, the inclusion of voters who did not feel close to any party slightly reduced the consistency of the relations between ideological classes and party voting. Given the relatively small number of observations for each of these classes, however, splitting them by partisan proximity – even if the variable was available – would have been much more problematic for the quality of the results.

conservatives of Brothers of Italy (FDI) and Alternative for Germany (AFD), both having belonged since 2014 to the group of the European Conservatives in the EU Parliament.

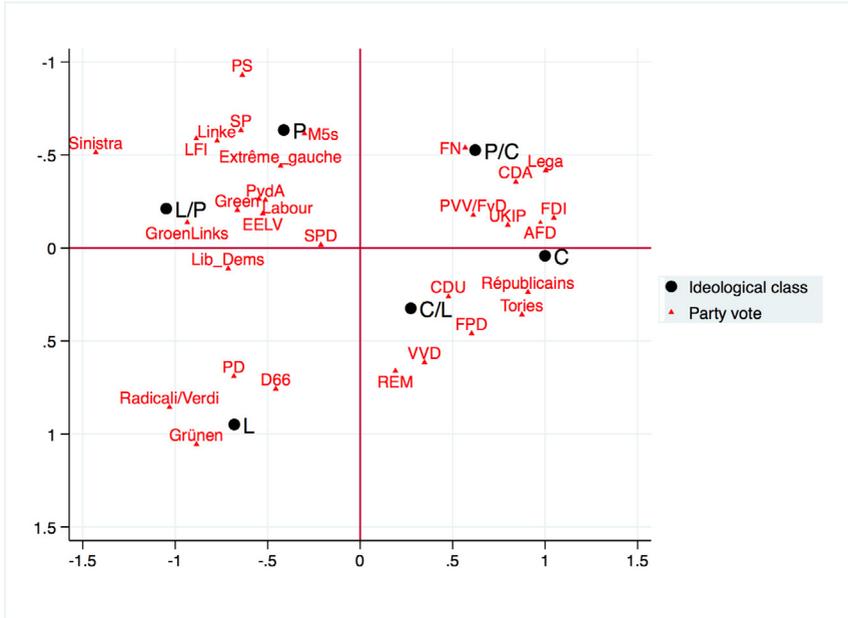


Figure 8.5. System of relations (proximities and differences) between ideological types and party vote in 5 European countries (dataset: Unimi/Pomlab 2020). Note: correspondence analysis: the two axes do not *a priori* represent two specific dimensions of the political space.

These parties rank between the conservative (C) and conservative/social (P/C) types, along with voters of other nationalist parties that combine cultural conservatism and economically non-liberal orientations such as the Dutch Party for Freedom and Forum for Democracy, the former being in the EU group of the radical right, the second with the Conservatives, while the Dutch Christian Democratic Appeal (CDA) belongs to the European People’s Party. The vertical axis tends to cover, on the contrary, the socioeconomic dimension of income, taxes, and the welfare state, and sees the ideological voters of Marine Le Pen’s Front National/Rassemblement National, which was part of the EU Identity and Democracy group with the League, the PVV and, from 2019, the AFD, as

best matching the Conservative/Social type (P/C). Closer to the conservative (C) type, characterised by a less accentuated social orientation, are the French *Républicains* (European People's Party) and the 2020 British Tories (members of the European Conservatives until Brexit). Culturally less conservative and clearly more market-oriented are the more ideological voters for Emmanuel Macron's *République et Marche* (REM) and Max Rutte's People's Party for Freedom and Democracy (VVD), both of which belong to the Liberal EU group Renew Europe. Between the Conservative/Liberal (C/L) and the Conservative type are the German voters for CDU (Angela Merkel's Christian Democrats of the European People's Party) and FDP (Free Democratic Party, Renew Europe).

An isolated pole is constituted by *de facto* contemporary 'liberals' such as the ideological voters for the Italian Democratic Party (PD, in the EU group of the Progressive Alliance of Socialists and Democrats) as well as, more typically, the Italian Radicals and Greens ("More Europe", affiliated with the European Alliance of Liberals and Democrats), the German Greens, the Dutch D66 and, although economically less liberal, the British Liberal Democrats (the last two belonging to the Liberal EU group Renew Europe). This pole of anti-egalitarian liberals best demonstrates the inadequacy, even at the level of mass electorate, of a dichotomous approach to the representation of political space in the contemporary European ideological field. Those who tend to combine the polar stars of freedom and equality (liberalism/progressivism – L/P) are the French, British and Dutch Green voters, together with voters for three parties that are or were (before Brexit) members of the EU socialist group: the Dutch and British Labour and (closer to the barycentre) the German Social-Democrats (SPD). Among those who focus on socioeconomic egalitarianism, (progressive/socialist type, P), the voters for the Italian Five Star Movement appear, interestingly, as very typical, even though their primary identity was defined by a metapolitical ideological polar star (popular sovereignty in opposition to 'corrupt' parliamentary power) and in 2020 they were not affiliated with any EU parliamentary group. Around the same ideological class, there are the ideological voters for parties of the "European United Left", such as La France Insoumise (LFI), the German Die Linke and the Dutch Socialist Party, together with the French Socialist Party, whose voters are much less

numerous since the rise of Macron's party, but also more devoted to the original egalitarian polar star.

The distinctive 'thirdness' of the liberal matrix can be more or less visible at a given moment, due to its tendency to refract on the other two main ideological matrices – both in the cultural or economic sphere – and therefore to become invisible as an autonomous political entity. But there is a further level – the metapolitical question of the type of regime – where the liberal matrix reveals its distinctiveness. And it does so especially in times of crisis, when the liberal metapolitical principles of parliamentary democracy and representative government are increasingly called into question by the supporters of the conservative and progressive matrices, whose adherence to liberal democracy is the consequence of historical developments – as such, they are always susceptible to change – but it is not inscribed in their 'matricial' principles. In order to grasp voter attitudes towards this metapolitical level according to their political ideologies, a simple but effective indicator derives from a survey question asking whether in their opinion, in general, it is more up to the government and/or the parliament to make decisions; or whether the people should matter more than parliament; or whether a strong leader should decide.<sup>33</sup>

In Figure 8.6, the usual ideological types and party families are mapped in their system of relations with the metapolitical dispositions derived from the previous question: liberal-democratic (defending the role of Parliament in conjunction with the executive), populist (in favour of more direct popular sovereignty), and authoritarian (in favour of a strong leader). The defence of the liberal-democratic model is clearly a property of the liberal matrix, whose ideological bearers are in the lower left quadrant. At the antipodes of their position are those of the conservative/socialist type (P/C) and the voters of the radical right parties, who are in favour of populist systems. As for the progressive/socialist (P) and conservative matrices (C), their support for a metapolitical liberal system is not unconditional: the former are also attracted, but only in their radical expression, by the populist model, while the latter are those more willing to consider an authoritarian

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33 The precise wording of the question was: "In your opinion, in making most of the decisions for the country: (a) The people should have more say in the matter than parliament; (b) It is better that parliament has the last word (c) Decisions should be made by a strong leader (d) The decisions must be taken by the government together with the parliament."

solution.<sup>34</sup> This reminds us once again that the progressive and conservative matrices, in their ‘pure’ types, do not necessarily pursue their polar stars within the metapolitical framework of a liberal order, which is, in fact, entirely orthogonal – it can be present or absent – to these political ideologies of modernity.

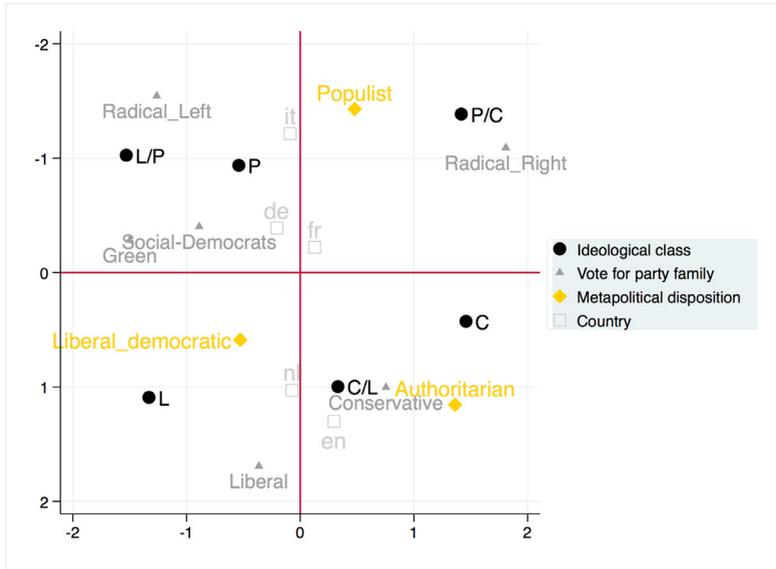


Figure 8.6: System of relations (proximities and differences) among ideological types, vote for party family and metapolitical attitudes towards liberal-democracy, populism and authoritarianism in 5 European countries (dataset: Unimi/Pomlab 2020). Note: Multiple correspondence analysis with country as a supplementary (passive) variable.

A wide spectrum of applications is open for further investigation in the fields of public opinion and voting, but also of political communication, social movements and public policies. The application shown here was based on a simple battery of survey questions, but many other indicators may be devised for the same set of ‘polar stars’. The condition is that, following the logic of Figure 8.4, the approach is both multidimensional (the dividing lines are potentially three, as many as the main polar stars of

<sup>34</sup> The proximity of the conservative ideological class and party family with the authoritarian option is largely due to the British Conservative voters, perhaps as a result of their contingent support for Boris Johnson’s leadership.

political modernity) and relational (cherishing a goal is not enough – it also depends on how this goal relates to others). Indeed, even when the research results are presented in a two-dimensional form – as in Figures 8.5 and 8.6 – it is the underlying process that is three-dimensional and relational, namely in the construction of ideological types/classes.

By further combining the logics of deductive and inductive research, the most micro and contextual items possible could be tested as possible indicators for the three dimensions, including for example experiments with textual, visual or video items tapping individual preferences and practices of cultural consumption (e.g. buying expensive imported electric cars, powerful SUVs or inexpensive and perhaps domestic cars) or social media communication (e.g. sharing certain types of meme) that could shed light on the links between social-identity markers and ideological directions. A similar approach could be applied to the study not only of the individual level of citizens, but also of the texts, policies and behaviours of collective actors (parties, associations, movements, governments, institutions).

## Conclusions

The itinerary followed by this book should have shown the paramount importance of *decontesting* the concepts of order, freedom and equality as symbolic polar stars of the main ideological matrices of political modernity. In other words, they must be removed from ‘contest’ and contention over their meanings. Political philosophers (Freedman 1996, 2016) have shed light on this point, which I have also tried to develop through research work on original *texts* and their *contexts*. It is specific types of order, of freedom, and of equality – and not any order, freedom, and equality – that underlie the fundamental ideological divisions of both modern and contemporary politics. When understood in a too general sense, in fact, these three concepts become consensual and desirable for everyone, and therefore unable to differentiate one political actor from another. At best, they give rise to competition for the symbolic ownership of one or more of these ultimate goals for the political organisation of collective life: one aims to be recognised as the force of public order, the other as the party attached to individual liberties, and the other as a sentinel against the more blatant inequalities within society.

There are historical cycles throughout modernity where this trend towards ideological convergence has come to predominate, with a restructuring of the ties between over-stretched polar stars and political actors deviating from their original matrix. The last of these cycles – I provided some evidence of this in Chapter 7 – ended with the beginning of the new millennium. A new cycle of partial ideological convergence could open as a mid-term consequence of the Covid-19 pandemic. There are signs of a new reshuffle and depolarisation in the ideological fields of the Western world, at least among institutional agents. But having adopted a temporal perspective that extends over a few centuries, it would be a cognitive error of eternalising the present to reach the peremptory conclusion – as many observers do as I write – that after the pandemic “nothing will ever be the same again”. History has shown that there are recurrent patterns that unfold after major catastrophes (Scheidel 2017), because they invariably trigger centripetal pushes towards centralised efforts of social protection, whether emanating from conservative or from progressive political forces. These contexts are inherently illiberal: the polar star of freedom becomes clouded by the needs and wills generated

by the economic, social, and health-related crisis. The state – or the EU meta-state – regains the upper hand as a metapolitical actor that gives a political direction to society: first with the removal of civil liberties that seemed the most elementary in the framework of well-established liberal democracies, then with massive programmes of public spending to guide regrowth according to consensual objectives (environment, health, digital technology).<sup>1</sup>

No one can exclude with certainty that this historical moment will result in a real paradigm shift in ideological politics, overcoming once and for all the frames of reference that have dominated throughout political modernity. However, it seems more probable, given the inertia exerted by the categories of the modern paradigm (its political institutions, its economic forces, its founding values), that a next cycle of expansion and relative economic prosperity will allow the new deployment of forces of the liberal matrix – in the cultural and economic fields – with their centrifugal thrust, aimed at encouraging autonomy, responsibility and individual initiative. In turn, this movement of history would sow the seeds for the growth of an environment conducive to the re-emergence and reorganisation of the forces of order and equality. The last element of prediction contained within the framework proposed in this book is that, in hyper-modern ideological fields whose technological, economic and communication infrastructures are provided by digital platforms and the societal bases seem to be characterised by the exacerbation of the modern logic of ‘contingency’ (Chapter 2), one could expect a radicalisation of the double movement of modernity, with an accelerated alternation of mainly centrifugal or centripetal historical thrusts, within which, however, the ‘counter-hegemonic’ pressures of the forces momentarily in retreat never cease.

Here, however, the predictive capacity of the scheme stops in its very general tendencies. The provisional outcome, the point of equilibrium reached from time to time in the ideological fields on a subnational, national and supranational scale depends on a recursive, and essentially triangular, combination of specific factors relating to the context, the ideological supply and its demand. A new context is more favourable to some actors rather than others because it generates public expectations that go in the direction of some polar stars at the expense of others. However, the actors

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1 From NextGenerationEU, the EU-funded recovery plan for Europe, to Joe Biden’s Covid-19 stimulus bill in the United States.

can in turn define the perception of the context and therefore orient the production of demand, for example in a sense more oriented towards order or equality in the phases of centripetal thrusts, or a synthesis of these. And the actors themselves (parties, leaders, movements) play an active part in the production of both supply and demand.

But when it comes to electoral outcomes – that is, when the demand coincides with the majority orientation in public opinion and in the electorate – the communicative capacity of political actors to present an offer that effectively matches the demand itself does not leave a huge margin of action: generally, the electoral reward goes to the actors who occupy the most credible position in the ideological field to pursue the polar star of the moment. To be sure, this outcome is conditional on their political ability to create or reactivate appropriate social alliances and, in fact, on their communicative capacity to establish themselves as the legitimate guides on the path towards that particular polar star. But it is the context, with its fundamental properties relating to the state of the economy, the cycle of government, institutional trust, exogenous factors or international politics, that selectively confers legitimacy and charisma on some actors and not on others.<sup>2</sup> Ideological discourses pertain to the sphere of symbolic systems, but they are enacted by actors who occupy objective positions in ‘real’ contexts, even if susceptible to some extent of a communicative reframing. For this reason, a ‘symbolic of the structural’ approach – neither unilaterally oriented to the communicative elements nor only to those of the objective context – appears necessary for a sociological understanding of these historical and political processes.

The clear recognition of the ideological direction inherent in political positions and choices, even when these differ in a relatively marginal and non-radical way, is a fundamental prerequisite for a democratic consensus that is not extorted from citizens through some of the more cynical logics of political communication. The concealment of ideological direction typically comes in the form of the personalisation of politics – that of political marketing and mediatisation of the 1980s and 1990s – as opposed to the ‘politicisation of *persona*’ that seems to me to have largely prevailed in the

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2 Weber (1922) noted this regarding the charisma of prophets, warlords, or magicians which was ‘activated’ by the crisis situations themselves (and not by the ‘charismatic personalities’ of these individuals), which generated, respectively, requests for salvation, defence from enemy attack, and an end to drought or famine.

first two decades of the new millennium; or in the form of the discourse of an anti-ideological pragmatism which, in reality, can at most coincide with the search for hybridisation or moderation in individual choices and positions, without however being able to truly free itself from the ideological compass associated with the paradigm of political modernity. Furthermore, if we assume that the recruitment of political personnel in an environment dominated by the practice of personalisation or by the discourse of pragmatism will tend to produce, in the medium term, a growth in clientelism, corruption – due to the very absence of polar stars to collectively pursue – and mediated scandals (Castells 2009), the expected popular reaction will go in the direction of democratic demobilisation (with abstention, institutional distrust and consequent democratic de-legitimation); or in those of radical populism or the support of an authoritarian or pseudo-authoritarian leadership, which in turn can be associated with explicit political-ideological contents or, on the contrary, conceal them, together with the social interests that this expresses, behind vague and apparently consensual slogans.

For this reason, I maintain that the double recognition of “the ideas behind the positions and the positions behind the ideas” is perhaps the best antidote on the one hand, as suggested in the introduction, to the totalising/totalitarian potential of ideological thought;<sup>3</sup> and on the other, to the symmetrical dangers of ‘democratic’ extortion of consent and the authoritarian confiscation of democracy. Acquiring the means of this double recognition is probably useful on an individual epistemic level; but those offspring of modernity that are the social sciences should not cease to believe that the dissemination of more knowledge and awareness is a premise of human growth, or at least of human defence against its own self-destruction. Hence, this may call for a kind of social-epistemic activism that publicly practices this double recognition of where the actors in the ideological field are taking us, sometimes inadvertently, and why. Political activism can then follow, for anyone who wants to steer the collective direction towards a polar star. Max Weber called it knowing one’s *daemons*. I would add: knowing where they come from, also to make their ideological power less absolute.

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3 As for excesses in terms of ‘affective’ polarisation, which refers to the growing perceived distance between a liked partisan in-group and a disliked out-group based on the strengthening of social identities (Iyengar et al. 2019), this can also occur in the absence of real ideological polarisation, as contemporary studies on the affective tribalism of social media networks demonstrate (for an overview, see Barberá 2020).

# Appendix

Appendix table 1. Distribution of party voters by ideological types in seven European countries (European Social Survey 1-8).

	All party voters		Voters close to a party	
	N	%	N	%
C (Conservative)	6,764	26.39	4,538	26.18
P (Progressive or Socialist)	8,126	31.71	5,445	31.44
L (Liberal)	2,538	9.90	1,628	9.39
P/C (Progressive/Conservative)	3,353	13.08	2,229	12.86
L/P (Liberal/Progressive)	3,235	12.62	2,329	13.44
C/L (Conservative/Liberal)	1,613	6.29	1,116	6.69
Total	25,629	100.00	17,334	100.00

Appendix table 2: Number of observations (voters) for the parties analysed (ESS 1-8)

	Total	Close to party
	(N)	(N)
<i>Austria</i>		
OVP – People’s Party	885	568
SPO – Social Democratic Party	1,036	658
GRUNE – The Greens	384	287
FPO – Freedom Party	308	191
<i>Netherlands</i>		
CDA – Christian Democratic Appeal	891	609
PvdA – Labour party	954	636
VDD – People’s Party for Freedom and Democracy	720	495
GroenLinks – Green Left	216	147
SP – Socialist Party	405	277
PVV – Party for Freedom	209	143
D-66 – Democrats 66	285	187
<i>Sweden</i>		
KD/Moderata – Christian Democrats/ Moderate Party	925	661
SSDP – Social Democratic Party	1,373	1,076
Centerpartiet – Centre Party	183	130
Gröna – Green Party	274	223
SweLeft – Left Party	345	295
SweDem – Sweden Democrats	110	78
Liberalerna – Liberal People’s Party	236	152
<i>France</i>		
UMP-Rep – Union for a Popular Movement-Les Républicains	1,107	780
PS – Socialist Party	1,608	1,158
Verts – The Greens	287	177
PC-FdG – Communist Party-Left Front	222	178
FN – National Front	387	226

Appendix table 2: Number of observations (voters) for the parties analysed (ESS 1-8)

<i>Spain</i>		
PP – Popular Party	1,414	875
PSOE – Socialist Party	1,725	1,138
Izquierda – United Left	373	270
<i>Germany</i>		
CDU – Christian Democratic Union	1,998	1,208
SPD – Social Democratic Party	1,857	1,089
FDP – Free Democratic Party	187	96
Grünen – The Greens	440	322
PDS/Linke	706	480
<i>United Kingdom</i>		
Tories – Conservative Party	1,292	887
Labour – Labour Party	1,663	1,161
LibDems – Liberal Democrats	624	353
Total	25,629	17,211

Appendix Table 3: Composition of party families as used in multiple correspondence analyses (ESS rounds 1-8)

	Conservative/ Christian Democratic	Social-Democratic	Liberal	Green	Radical Left	Radical Right
UK	Conservative	Labour	Liberal Demo- crat	Greens		UKIP
Germany	CDU/CSU	SPD	FDP	Die Grünen	PDS-Die Linke	AFD
France	RPF (Ras- semblement du Peuple Français) / UMP (Union de la Majorité Présidentielle)	PS (Parti Socialiste)	Répub- lique en Marche	Les Verts / EELV (Europe Ecologie Les Verts)	PC (Parti commu- niste) / FDG (Front de Gauche)	FN (Front National)
Spain	Partido Popular - PP	PSOE			Izquierda Unida	
Austria	ÖVP	SPÖ		GRÜNE		FPÖ
Holland	Christian Democratic Party/Appeal	Labour Party	Party for Freedom and De- mocracy/ Demo- crats '66	Green Left	Socialist Party	Party for Freedom
Sweden	Christian Democrats / Conservative (Moderata samlingspar- tiet)	Social Democrats	Centre Party / Liberals (Folkpar- tiet liber- alerna)	Green Party	Left	Sweden Demo- crats

Appendix table 4. Distribution of party voters by ideological types  
in five European countries (Unimi/Pomlab 2020).

	(N)	%
C (Conservative)	388	21.33
P (Progressive or Socialist)	390	21.44
L (Liberal)	247	13.58
P/C (Progressive/Conservative)	150	8.25
L/P (Liberal/Progressive)	248	13.63
C/L (Conservative/Liberal)	396	21.77
Total	1,819	100.00

Appendix table 5: Number of observations (voters) for the parties analysed (Unimi/Pomlab 2020)

	Party	(N)
<i>France</i>		
	Extr_gauche – Extreme Left	63
	LFI – La France Insoumise	104
	PS – Socialist Party	139
	EELV – Europe Ecology - The Greens	93
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# Polar Stars

## Why the Political Ideologies of Modernity still Matter

**Mauro Barisione**

Contrary to the cliché that our age is post-ideological, this book contends that political ideologies are part of the logic itself of modernity and continue to permeate 'hyper-modern' politics. Using a multitude of primary sources (texts) and data, the author identifies the 'polar stars' – guiding principles such as order, freedom and equality – around which ideological fields have developed, mainly in Europe, in recent centuries. In place of the too reductive concepts of 'left' and 'right', this book uses a different strategy to analyse the orientations of contemporary political movements, parties, policies and voters: it reconstructs the main ideological 'matrices' of modern politics in their historical origins and subsequent phases of radicalisation and hybridisation, which still continue, both among these political matrices and with 'metapolitical' ideologies like populism. In doing so, the book also propounds a broader theory that helps to interpret recent ideological trends as reflecting a distinctive 'double movement' of modernity: the continuous tension between liberalising pressures for greater individual rights and, vice versa, 'centripetal' countermovements along either the matrix of order or that of socioeconomic equality.

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