Movement Learning Catalyst:

A Guide to Learning for Systemic Change

CREDITS

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European Alternatives works to promote democracy, equality and culture beyond the nation-state and imagine, demand and enact alternatives for a viable future. We articulate a radical, long-term vision of politics, society and culture beyond the nation-state, experiment with forms of action for transformative change, and build the capacity, mutual-awareness and connection of activists and organisations.

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Ulex Project

The Ulex Project is a leading European activist education organisation. Working as a collective and operating through a solidarity economy, they take an holistic approach to movement building that integrates personal, organisational and social movement transformation. They work with an extensive network across the region, who they support with capacity building through accompaniment and training that foster deep reflection and transformative learning.

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ECON is a network of progressive groups and organisations across Europe engaged in community organizing towards social and environmental justice. We enable members and partners to strengthen organizing capacity, coordinate international solidarity, and support the sustainability of the community organizing sector.

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INTRODUCTION

The context

We're living at a historical point of disruption which contains both great peril and promise. The stalled engine of neoliberal growth, bankrupted political leadership, deepening inequalities in wealth and power, ongoing racist and patriarchal violence, and the fierce urgency of the ecological crisis delimit the terrain upon which we need to contest our future. Against a backdrop of a rising far right, big data, and the ongoing consolidation of unaccountable power by elite groups, we have a lot to do. Now is the time for something new to emerge.

In this context, we need to build movements with the power and scale to organise for systemic change. However, too often, when people from different organisations, networks, or movements come together, they each bring their competing agendas, preferences, and prejudices about each other which can exacerbate existing tensions and limit the scope for finding new and transformative ways of collaborating across differences.

Who are we?

The Movement Learning Catalyst (MLC) was initiated as part of an international collaboration among different pan-European activist training and popular education networks: Ulex Project, European Alternatives (EA), European Community Organising Network (ECON), and activist researchers at the National University of Ireland Maynooth. Each of us draws on a long history of bringing movements together to learn from each other's struggles through activist learning and popular education reaching across many different movements, geographies, and social realities. Ulex's European Programme, especially the Ecology of Social Movements course, EA's School of Transnational Activism, the Citizen Participation University, which ECON have played a key role in convening, and the Master's in Community Education, Equality and Social Activism which ran at Maynooth all contribute to our knowledge and experience base in shaping this collaboration. The MLC grows out of our feeling that we all need to reach beyond our existing networks, scale up our contribution to movement learning, and enable a deeper transformation in our movements.

During the pandemic, Ulex and Maynooth collaborated on an extensive survey reaching more than 100 organisations, groups, and movements across Europe with the aim to identify the key challenges movements and organisations are facing as well as the learning needs they may have to become more effective in building power and scale in their movements. The MLC was built on the basis of what activists were telling us then, along with the insights each of the partners has accumulated through many years of engagement. We enhanced our understanding through further rounds of research and a review of documents and datasets from the programmes of partner organisations. To further ensure that our work would be genuinely responsive to movement learning needs, we interviewed trainers and researchers on movement learning, and conducted focus groups with activists and organisers from different backgrounds, contexts, identities, working on different issues, at different levels from local to international.

Figure x.1. Participants of the Citizen Participation University, Hungary, 2022 (Source: ECON)

Combining our experience of working closely with movements with insights emerging from the research, it became clear that movements generally are struggling to come together as effective and strategic political actors capable of bringing about the far-reaching social transformations at which we are aiming. Fragmentation and division prevents individual movements, let alone alliances of movements, from emerging as effective actors. Without the capacity for longer-term strategy, movements are condemned to reacting to ever-changing situations that they have no control over. Facing a constant pressure for action, they find making time for reflection and learning to be a huge achievement.

As a focus for this guide, we prioritised the following key movement challenges:

Fragmentation and division within and between movements: Challenges in collaborating and building alliances within and between movements. Participants expressed difficulties in working together across organisations and movements focussed on different issues, strategies, and identities, as well as engaging in cross-movement strategizing. Movements struggle with how to respond to internal inequalities of power and privilege and different identities and lived experiences. They also expressed difficulties in working together across different geographical contexts, languages, and cultures; tensions between those working at the "grassroots" and those at international levels, linking local issues to global systems of injustice, and challenges in organising and building movements across borders.

Lack of movement capacity for longer-term and coherent strategy: Challenges in long-term strategic capacity involving forming, articulating and communicating political visions, strategic thinking, power analyses, context analyses, and balancing short-term urgency with long-term strategic view.

Lack of capacity for ongoing reflection and embedded learning, both from experience and from each other: Many factors including urgency, overwhelming demands on time and energy, lack of receptivity to each other, unwillingness to acknowledge the limits of understanding, and a lack of skill or methods for transformative learning, all contribute to a diminished capacity for movement and organisational learning.

There seemed to be an emergent desire for movements to develop the capacities to respond to these challenges and to strengthen their ability to build movements.

Why a Movement Learning Catalyst?

The Movement Learning Catalyst (MLC) is an initiative that aims to contribute to movement infrastructure and to strengthen movement learning and practices through a variety of learning resources, practices, structures, programmes, and learning communities. It was created to help address the key challenges movements in Europe face and their learning needs for more effective movement building, strategizing, and learning required to achieve structural transformation.

From a recognition of the importance for movements to develop their capacity for learning, the MLC guide creates critical learning space for reflecting on and developing our movement practices and buildwing the kind of relationships and thinking needed to build movement power for systemic change in an ever-changing world. It synthesises insights from the experiences of the people, organisations, and networks involved in MLC on transversal organising, transnational and translocal organising, movement strategy, and movement learning and popular education to create a critical learning space for reflecting on and developing our movement practices.

At the heart of this guide is an understanding that the diverse range of social movements are to be understood as an ecology of social movements with different interconnected actors across issues, strategies, geographical, cultural, and ideological boundaries. We will embark on a journey to analyse our own movement practice, explore and develop the competencies for building alliances within and between movements across diversity and geographical space. We will challenge ourselves to question our assumptions about how change works,

and expand our thinking of strategies in new ways that take into account the diversity of strategic approaches and the responsiveness to the volatile, uncertain, complex, and ambiguous world. We will explore the dynamic interplay between local and global struggles and how to organise transnationally and translocally in the broader fabric of resistance. We will reflect and learn from our experience in movements, and we will draw on popular education to create spaces for learning and knowledge production in movements.

Overall Learning aims:

1. Transversal organising and the ecology of social movements: Understand the concept of ecology of social movements, gain insight into the diverse actors and contributions within social movements, placing movements within a historical context, and develop the capacity to collaborate within and between movements.
2. Transnational and translocal organising: Develop an understanding of transnational and translocal concepts, analyse power dynamics within these contexts, examine historical case studies, and explore the role of radical imagination in envisioning alternative futures beyond nation-states.
3. Strategy and movements: Embrace vision, values, and radical imagination in shaping long-term goals, analyse contexts, and strategize to challenge hegemony for large-scale social change.
4. Movement learning and popular education: Explore the diverse dimensions and levels of activist learning, critically reflect on the historical and theoretical foundations of radical popular education, discuss the role of dialogue and research in movement learning, and emphasise the importance of documenting and disseminating movement learning.

The MLC guide is a collection of curricula and learning resources to enable movement learning for systemic change, including different frameworks, models, tools, practices and examples. It is composed of four distinct and complementary parts and an educator's guide described below:

Part 1. Transversal organising and the ecology of social movements

This part discusses the importance of working with differences within the "ecology of social movements" to address global challenges such as the rise of authoritarianism, climate collapse, and increasing inequality. It emphasises the strength in diversity and the need for transversal organising across various social and organisational differences. The chapter aims to equip activists with the ability to work effectively across power imbalances, understand intersectionality, and engage in strategic alliances for transformation, underlining the necessity for activists to see themselves as part of a broader, dynamic movement landscape.

Part 2. Transnational and translocal organising

This part explores the concepts of transnationalism and translocalism, challenging learners to reimagine organising beyond the nation-state. Emphasising global solidarity, it traces the heritage of social movements and confronts borders, advocating for collaborative efforts to dismantle globally interlocked systems of oppression. The first module introduces the theoretical frameworks of transnationalism and translocalism, highlighting their relevance in understanding and combating power dynamics and divisions enforced by state borders. The second module shifts focus towards transforming transnational flows of power, emphasising strategic engagement with global systems of power and their manifestations in people, capital, and information. Module three offers a historical perspective, drawing lessons from past transnational activism to inform current strategies. Finally, module four proposes the use of radical imagination as a tool for envisioning and realising futures that transcend national boundaries, fostering a creative and collective approach to organising for a more equitable world.

Part 3. Strategy and movements

This part explores practices essential for developing strategic approaches in a movement context. Starting with developing vision and moving through a series of tools for analysing context and understanding the conditions we organise within, it then moves on to look at how we develop theories of change that work at scale and the skills we need to strategize in the face of complexity. This progression is designed not merely as an academic exercise but as a practical framework aimed at equipping activists and change agents with the tools and insights necessary for developing strategies that are not only adaptive but deeply impactful. By integrating these diverse elements, the curriculum fosters a holistic approach to strategizing. It encourages a shift from linear, reductionist thinking towards embracing complexity, fostering collaboration, and nurturing a radical imagination. In doing so, it aims to empower movements to craft strategies that are capable of navigating uncertainties and seizing the opportunities of our ever-evolving social landscape, thereby effecting transformative change.

Part 4. Movement learning and popular education

This part delves into the rich, layered processes of movement learning and popular education, emphasising the transformative power of activist knowledge production and sharing. It begins by highlighting the importance of reflecting on personal and collective activist experiences, using these reflections as a foundation for understanding and enhancing movement learning. The series explores the history, principles, and practices of radical popular education, drawing heavily on Paulo Freire's work to emphasise dialogue, critical reflection, and the political commitment to emancipation. It discusses the critical role of dialogue and participatory action research in fostering meaningful learning experiences and enhancing community engagement. The importance of capturing, codifying, and disseminating movement knowledge to prevent loss and promote learning continuity is underscored. Finally, it touches upon the transnational and transversal aspects of popular education, encouraging a global perspective on activist learning. Through critical reflection and engagement with these concepts, activists are equipped with the tools to deepen their understanding and practice of movement learning and education.

Notes on pedagogy: An Educators' Guide to Using the Movement Learning Catalyst Resources

Finally, the MLC educator's guide aims to support educators to use and contextualise MLC learning resources to their group and organisations. It presents the pedagogical principles and practices for transformative learning of the MLC drawing from radical popular education, particularly Paulo Freire's work. It emphasises the importance of starting from participants' experiences and re-contextualising and adapting educational materials to diverse activist contexts. It highlights the importance of relational learning, critical reflection, dialogue, peer learning, and attending to the emotional dimension of learning. It suggests cultivating openness, empathy, and humility to navigate the complexities of group dynamics and power relations, and using a holistic pedagogy integrating diverse forms of learning.

We have tested the learning resources in this guide in different learning programmes, both in-person and online, in our organisations and as part of a collaborative, year-long MLC programme that we piloted in 2023-2024. We have gathered feedback from participants to improve and further develop the materials in this guide. We are interested in an ongoing development, deepening, and expansion of the guide and to continue testing it in different formats. So if you have feedback or plan to use it, you are welcome to reach out.

Who is this guide for?

The Movement Learning Catalyst (MLC) is designed for experienced activists and organisers deeply embedded in social movements, seeking reflection and development of their practice to enhance their effectiveness in effecting systemic change. This guide targets individuals actively involved in organisations, networks, or movements, keen on evaluating their roles within the broader landscape of social movements and strategizing ways to amplify their impact. We envision the guide's users as practitioners who have already honed the practical skills needed for activism through active engagement in their groups and organisations, whether in direct action, campaigning, organising, or social media advocacy. While the guide is specifically crafted for movements and contexts across Europe, its principles and insights are applicable beyond the European sphere, offering relevance to diverse global contexts.

Figure x.2. Participants of the Transnational Assembly towards Ecological Syndicalism, part of Transnational School of Activism, Bremen, 2022 (Source: Theatre Bremen)

How to use the guide?

We've developed this material so that it can be adapted to your needs. Groups, organisations, and movements can face different challenges and have different learning needs. So, take what works for you to support the reflection and learning you need. Each part of the MLC could be considered as a stand-alone curriculum or in combination with other parts to support your learning and to design contextualised pathways through the curricula. You will be able to select among a total of 24 modules, 60 learning activities, 4 educator's resources and to put this guide into practice and 150+ additional learning resources to inspire you and delve deeper into the content.

In order to contextualise the curricula and adapt them to your group and organisation in designing a learning pathway, we recommend the following approaches:

Centring your movement experience: This guide is designed to empower activists and organisers by putting their lived experiences at the forefront. This firsthand knowledge of navigating diverse movements and confronting systemic challenges is invaluable. Start from that experience, from the main challenges you face as a movement, and use that as a way to root the content in this guide. As you engage with the content within this guide, we encourage you to reflect on your personal experiences, victories, setbacks, and lessons learned. By centering movement experience, we aim to foster a deeper understanding of the complexities inherent in activism and organising, allowing all of us to draw upon our unique insights to drive significant change.

Shape your own learning path: We recognize that every activist and organiser's journey is unique, shaped by individual contexts, priorities, and timelines. Therefore, this guide is not intended to be followed as a rigid roadmap. Feel free to navigate its contents in a way that best suits your needs and circumstances. Whether you choose to dive into specific sections based on immedi-

ate challenges, revisit chapters for ongoing learning and reflection, or explore topics out of sequence, know that the flexibility of this guide is designed to accommodate your dynamic journey as an activist or organiser.

Pedagogical approach: We emphasise that MLC is about creating space for deep reflection on experience and learning from each other. This guide should not be used for mere content delivery, but rather to support learners build on what they already know to develop their practice further. We imagine learning environments inspired by *popular education*, recognising and building on participants' existing knowledge and capacities, and bringing in new material and examples in a way that is relevant for them. If you plan to use this guide to design and deliver a learning programme, we invite you to read the last part of this guide titled "*Notes on pedagogy: An Educators' Guide to Using the Movement Learning Catalyst Resources*", which elaborates on the MLC pedagogical principles and practices to design and facilitate learning and education programmes using the curricula in this guide. It also includes examples of how we have applied parts of this curriculum and lessons learned from those experiences.

Figure x.3. Participants of the Ecology of Social Movements training, Catalunya, 2018 (Source: Ulex Project)

Disclaimer

In this guide we have curated a collection of curricula that address the overall aims of the MLC with key contents developed by the different partners and references to relevant learning resources. We would like to make a few disclaimers and clarification about this guide.

This guide does not pretend to be exhaustive: It contains a selection of concepts, frameworks, tools and practices that represents only a portion of the vast array of knowledge available on these themes. The selection process was informed by the partners' current knowledge, experience, and practices. The guide is designed to evolve over time, potentially incorporating more diverse content in the future.

This guide presents diverse views on systemic analysis and strategies for systemic change. It was written by a team of activist educators from diverse movement backgrounds, organisational contexts, and cultures, each with their own commitments to different political strategies, values, and perspectives. In supporting movement learning across difference, we view these different viewpoints as a strength rather than a weakness. Our organisations do not coincide on every point within this guide, but we are confident that by starting from your own activist experience and learning needs you will find the material here useful in developing your own movement practice.

Everyone's movement histories are specific, rooted in particular social realities, geographic and cultural contexts, and informed by particular political traditions and experiences. Activist learning often seeks to generalise beyond what we have learned in our own skin, to save ourselves and others the cost of having to "reinvent the wheel" each and every time in the face of repression and defeat, inequality and trauma. But this generalising is always shaped by those with whom we form alliances and create learning contexts. Even as pan-European activist training networks that each learn from and engage with a very wide range of movements and communities in struggle, positionalities and

locations, political and cultural ideas, our understandings are still incomplete and provisional. This is a major part of why we have decided to come together to bridge our differences and jointly develop material that can be more widely useful; but it does not mean that this guide is exhaustive or contains all the answers for everyone. New generations of activists, new migrant populations and new initiatives keep on creating new ways of responding to the crises we face. Our intention though is to keep learning together, engaging new voices at the same time as we try to make existing movements' hard-won knowledge more widely available – and support collective learning for social transformation from below.

In the dynamic landscape of contemporary movements in Europe, it has never been more urgent to enhance our capacity for collaboration, collective strategizing, learning and action. As movements confront the challenges of our time, the Movement Learning Catalyst stands as a space of possibility – to recognize and support our interconnected struggles, and a tool for collective liberation. By embracing the transformative power of movement learning, we embark on a journey of reflection, analysis, and action, forging alliances across differences and catalysing a movement of movements to create "a world where many worlds fit"

Transversal Organising and the Ecology of Social Movements

Overview

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Credits

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PART 1
TRANSVERSAL ORGANISING AND THE ECOLOGY OF SOCIAL MOVEMENTS

INTRODUCTION

Together we stand – divided we fall. Activists have known this for centuries, but today it seems harder than ever to find ways of working together across our differences. How can we develop the alliances we need to protect one another and make a better world possible? The rise of the far right and authoritarian governments, the slow collapse of the climate, the push towards warfare, geop-0poolitics and extractivism, and the constant rise of inequality in every area of life – to turn these tides we need to build deep, powerful alliances. These alliances need to be robust enough to survive the speeding-up of history, as well as the internal tensions that inevitably arise as we do this work across the very real differences of power and privilege that exist between us.

This part focuses on the challenges of working across differences within social movements, building alliances, and understanding our work in relation to the multiplicity of actors involved in movement life. It introduces the concept of an "ecology of social movements", emphasising the interconnectedness and diversity of organisations, groups, and networks within movements. This diversity is seen as a strength, enabling movements to tackle complex issues and challenges more effectively, but it is also a source of tensions – which can both weaken our power or offer creative opportunities to grow.

This part also explores the concept of "transversal organising", or building movement connections across different kinds of movement organisations, across different tactics and strategies, different social positionalities (class, gender, sexuality, race, ethnicity, dis/ability etc.), and across apparently different issues, languages, and movement cultures. It invites us to see ourselves as part of wider, more complex, and continually changing movements and movement landscapes.

Learning aims

- Understand movement ecology in order to better situate our efforts in the context of the diverse contributions and actors within social movements
- Better understand our social movements within a historical context
- Assess opportunities for alliance building within and between movements based on the current position of movements, historical perspectives, and present-day possibilities
- Support effective alliances across different movements and communities by strengthening the capacity to collaborate
- Analyse different transformative strategies and identify complementarities and synergies between them with the goal of building power

Analyse and navigate dynamics of power and privilege within and between social movements. The chapter is structured around modules that progressively explore these themes, starting with understanding movement ecology and history, moving towards practical strategies for collaboration and alliance-building, and concluding with reflections on personal and organisational challenges in transformative work. In the first two modules participants situate their own organisation as part of a wider "ecology of social movements", particularly within their own movement, however defined, and explore their movement on a longer timeframe than the present. The third module zooms out further to look at historical examples of movement alliances, helping to expand a sense of possibility. We then get down to the nitty-gritty of making it work: a module explores working with power and inequality within individual organisations, the complexities of intersectionality and the challenges of allyship. The next module explores these challenges on a wider scale; how to tackle power imbalances and inequalities

across movements and build effective strategic alliances across movements, cultures and communities in struggle. The final module explores working across differing transformative strategies, how groups with different visions and theories of change can find meaningful ways of relating that are not simply instrumental.

Considerations for educators

The primary focus for educators is understanding their learners and supporting them to learn from each other's experience, rather than just delivering content. This entails recognising the existing knowledge and awareness of learners, such as their motivations, organisational positioning, and historical insights within their movement. This part is geared towards activists who have already acquired practical skills relevant to their roles but who seek to enhance their efficacy. Typically, these individuals are committed to their cause and are familiar with the challenges of activism.

To facilitate effective learning, it's crucial to establish an environment where participants feel their challenges are acknowledged and significant. The goal is to enable learners to apply what they learn to real-world scenarios. Early modules emphasise exercises like movement maps and timelines to ensure participants feel capable and comfortable. Trust between educators and participants is vital for successful engagement, allowing for the integration of external materials as the course progresses.

In later sections, maintaining participant engagement becomes challenging, especially if the content surpasses their experiences. Providing relatable examples and avoiding a didactic approach help participants grasp new concepts. Additionally, keeping busy activists involved amidst ongoing crises requires strategic effort, as disengagement often leads to dropout.

Lastly, addressing participants' resistance and feeling of being stuck is essential. Many activists seek change but struggle to see how to implement it. Educators should avoid dismissing resistance and instead introduce new material in a way that allows participants to find relevance and meaning on their own terms. Overall, this kind of training involves understanding learners deeply, creating a supportive learning environment, and navigating challenges to ensure sustained engagement and meaningful learning outcomes.

MODULE 1. MAPPING ECOLOGIES OF SOCIAL MOVEMENTS

Introduction

Thinking in terms of the ecology of social movements helps to emphasise the networked characteristic of our movements and the involvement of a plurality of actors engaged in a wide range of activities. It draws attention to the numerous ways we are connected, both informally and formally.

But it's a bit more than this. An ecology of movements approach sheds light on the ways that social movements contain tensions between the commonality of identity and approach, which ties it together as a movement, and the diversity of actors and contributions contained within it. Increasing our ability to identify diverse actors, roles, and approaches, and to pay attention to the quality of relationships (both collaborative and antagonistic) will prepare us to think about transversal organising more strategically – and to acknowledge that this diversity is often crucial to the building of the collective agency needed for radical transformation.

Learning aims

- Enhance ability to identify diverse contributions and actors with our movements
- Increase understanding of what is meant by an ecology of social movements
- Acquire skills for mapping movement ecology
- Be able to apply these competences to enhance strategic organising and movement building

An ecology of social movements

Perhaps the most generally accepted definition of a social movement comes from Italian sociologist Mario Diani (1992). Aiming to offer a synthesis of the diverse range of definitions in use, he suggests that social movements are:

> "A network of informal interactions between a plurality of individuals, groups and/or organisations, engaged in a political or cultural conflict, on the basis of a shared collective identity." (Mario Diani, 1992)

Thinking in terms of the ecology of social movements, helps to emphasise this networked characteristic that involves a plurality of actors engaged in a wide range of activities. It also draws attention to the numerous ways they are connected, both informally and (despite Diani's view) formally. However, rather than agreeing with Diani's suggestion that "a shared collective identity" is a necessary component of social movements, an ecology of movements approach sheds light on the ways that social movements contain tensions between the commonality of identity, which ties it together as a movement, and the diversity of identities contained within it. Thinking in terms of an ecology of movements can help us to conceive of a movement as able to contain non-aligned, antagonistic, and even contradictory identities – and to acknowledge that this diversity is often crucial to the building of the collective agency needed for radical transformation. We might say that movements are often nested within "the movement".

A healthy social movement field requires a multiplicity of contributions, a diversity of identities, as well as actors and roles. Movement resilience and power emerges from the quality of relationships between these parts. Beginning to think at a movement or network level, to recognise the value of different and

even antagonistic contributions to the whole, attending to the quality of relationship between them, and becoming better able to acknowledge and hold the diversity in a healthy movement ecology, is of great value to our effectiveness and our resilience.

We emphasise the ecology of our social movements because:

- Complexity of change requires a multiplicity of contributions, creativity and synergy
- To combat interlocking systems of oppression requires interconnected forms of resistance
- Ambition to build large scale social movements for radical transformation engages diverse actors
- Greater diversity within an ecosystem increases resilience, adaptability, and redundancy in an ever-changing environment.

The interlocking and pervasive nature of the systems of oppression we face means that challenging them involves building interconnected movements of resistance and regeneration. At the same time, the difficulties involved in forming synergising relationships between distinct parts of our movements are widely recognised as a defining challenge for organising today. In a Europe-wide survey conducted in 2020, activists told us that the inability to build connections across movements, and the presence of high levels of fragmentation within them, was one of the most incapacitating internal challenges they faced.

Attempts to challenge injustice and domination, from the ground up, are rooted in people's lived experience. The specificity of their lives and the histories of their communities (even if retrospectively constructed) generates an irreducible diversity of struggles within our movements. With this in mind, it is important to both support diverse struggles on their own terms and also to foster relationships between them that can contribute towards transversal, majority social movement building capable of driving radical social and ecological transformation. It is the strategic importance of learning to work with the necessary diversity in our movements, and to increase our ability to build empowering connections across those differences, that leads to the key concept of the ecology of social movements.

Thinking in terms of an ecology of movements encourages us to look at our movements in terms of the relationships between things: roles, strategic approaches, struggles, issues, socio-political identities. It can help us to appreciate and understand the specific internal dynamics of diverse struggles and approaches, while also becoming better able to situate them in a wider context.

Healthy movement ecology doesn't necessarily imply harmony and balance between the parts. It is important to acknowledge the creative and generative role antagonism can play in making visible and transforming forms of domination and oppression. At the same time, it is important to recognise how disempowering it is when our movements get stuck in dysfunctional internal conflict. Taking an ecological or systemic perspective on the antagonistic and contradictory elements contained in our movements, recognising how they can add up to something greater than the sum of the parts, can support us to expand our tolerance of differences and transform unproductive conflict into creative tension. It can help us recognise the inevitably partial and provisional nature of diverse contributions (including our own) and support us to see beyond our own positions and inevitably limited perspectives – increasing our ability to foster cooperation and alliance building across our differences.

To some extent we can recognise fragmentation in our movements as reflecting the wider social trends of increasing distance between poles of opinion, 'conflict extension', and 'affective polarisation', where individuals begin to segregate socially and to distrust and dislike people from the opposing camp (The Policy Institute, 2019), all of which are, as we know, symptomatic of the related processes of atomisation and hyper-individualism driven by neoliberalism. But there are dynamics at work that are specific to social movements, and nuanced understanding of the way diversity and differences show up in our movements is crucial if we want to build transformative power.

Diverse contributions, strategies, roles, actors and identities

We have found movement mapping is useful both as a tool for strategic analysis of movement strengths and weaknesses and as a valuable pedagogical tool for enhancing understanding of movement ecology more generally. It requires a critical engagement with the identification and categorisation of movement diversity, as well as the relationships between actors and elements. This process includes analysis of the types of connections between actors and consideration of useful typologies related to actors, roles, and contributions. The movement mapping activities associated with this module walk people through an in-depth approach to exploring these aspects of the mapping process.

To support a critical engagement with identification and categorisation of movement actors, we offer several ways of looking at this that have proven useful in our experience. The set of perspectives comprise overlapping typologies, each of which provides useful insights into movement dynamics. The typologies are offered as provisional ways into the themes, rather than as definitive framings.

These typologies are framed in terms of characteristics, including: 1) distinct movement capabilities, 2) different transformative strategies, 3) a range of movement roles, 4) the way forms of activism are shaped by their interface with everyday life and organisational structures. Other significant factors include diverse identity formations related to specific issues and struggles.

1. Capabilities framework

To be strategic about capacity building we need to have a sense of the capabilities movements need to be effective and have transformative impact. Building on a list in Zeynep Tufekci's book, Twitter and Teargas (2017), we've devised a framework that (in addition to learning) emphasises six key capacities: *Narrative, Disruptive, Institutional, Cooperative, Prefigurative, and Resilience*. We use this framework to ask questions about where capabilities are generated, and by whom, within movements. We also look at how well developed these capabilities are.

Figure 1. 1.
Movement Capabilities Framework - Adapted by Ulex project from Tufekci (2017).

Narrative capability: Movements need to be able to tell stories, especially stories about how we got here and where we want to be heading. This is about analysis of the conditions that give rise to the injustices and problems we want to address. It's also about our vision, our goals, and what we can do to achieve them. Social movements are built on a sense of empowering connection, so narrative capability includes telling the story of who we are and being able to articulate the sense of purpose and shared commitment that underpin collective agency.

Disruptive capability: This is often the most visible manifestation of movement capability, and what is most easily recognisable to an onlooking public. It includes a wide range of actions that disrupt the functioning of the systems we challenge: strike action, boycotts, occupations, mass demonstrations that transgress the rules of the game, the wide-ranging tactics of nonviolent direct action, riots, or rebellion. At one level these actions are simply ways of saying "no" to ongoing injustice, seeking to prevent further damage directly, often temporarily, but sometimes with lasting impact. They also put the system under pressure, raising the cost of its everyday activities, escalating tensions, signalling power, and seeking to generate leverage for demands.

Institutional capability: As Tufekci discusses in her analysis of the Arab Spring (2017), where social movements achieve disruptive capability but lack an institutional capability, they usually fail to constitute a systemic threat. Or as Chantal Mouffe (2019) writes concerning the Indignados/Indignats and Occupy movements, although "protest movements have certainly played a role in the transformation of political consciousness, it is only when they have been followed by structured political movements, ready to engage with political institutions, that significant results have been achieved."

This kind of analysis can run the risk of short sightedness and failing to take account of the non-linear and complex nature of social change. Sometimes the legacy of these moments is to articulate new struggles and lead to shifts in culture and discourse that constitute foundations for later rounds of action. Even so, movements that lack what Mouffe calls a political relay, or intentionally eschew institutional engagement, tend to find their demands hit a wall or become co-opted. At the same time, we don't believe it is useful to frame institutional capacity solely in terms of reformist pathways, but to also recognise other ways of thinking about this, such as Andre Gorz's idea of "non-reformist reforms", for example. The key issue is the ability to shape mechanisms that translate narrative and disruptive power into sustained structural transformation. These mechanisms can, in theory, be either reformist or more revolutionary in nature.

Cooperative: Rarely do organisations or groups achieve deep and lasting social change alone. It requires broad based alliances, collaborative efforts, and coordination between diverse actors. Working with other actors, groups and organisations involve a range of specific skills and attitudes. Without people and organisations in our movements who bridge between other groups or communities, bring people together, and help to find alignment and cooperation we cannot build the collective power we need to generate.

Prefigurative capability: Unlike some of its proponents, we don't see prefiguration as a stand-alone strategy or alternative to directly contesting power. We see it as a complementary capability. On the long journey of social transformation, it is important that we don't lose sight of the value and power of ensuring that the ways we organise embody, as best we can, the kind of new social relations we strive for. Prefigurative capacity is about walking the talk. It's about creating organisations that embody a culture of care, anti-oppression and active solidarity practices, and that enable us to honour each other's potential as human beings. It includes the way power functions in our groups, the ways we make decisions, the way we balance autonomy and cooperation, and the paying of attention to economic justice and influence within activist organising.

More than this, prefigurative capability involves the creation of the social contexts needed for nurturing shifts in consciousness and our maturation as transformative subjects. We need opportunities to develop skills in

transformative collaboration, and to learn how to align our practices with our values. Where we can see our values embodied, even in the microcosm of our groups, it strengthens confidence in our potential and belief that change is possible, helping to rekindle the radical imagination. Prefiguration generates crucial opportunities for the experimentation and action-learning needed to guide our aspirations.

Resilience: Cycles of burnout, the consequent haemorrhaging of talent and knowledge, and the disruptions it causes to long-term movement building, seriously undermine our movements. Addressing this involves building capacity for resilience by paying attention to a wide range of factors, ranging from the cultivation of emotional literacy and self-awareness to the security skills needed to respond to repression and attack from state and non-state actors. We can broadly define this capability as: "the ability of activists, organisations, and movements, to endure and maintain stability under duress, build flexibility, learning, and adaptation into their approach, and to build the power and collective agency to achieve structural changes in society, that derives from a diverse range of intrapersonal, interpersonal, and political practices".

We came to recognise that psychosocial resilience is a foundational capability underpinning all movement development and needs to be integrated at the heart of all strategies concerned with deep and long-term transformation.

2. Transformative strategies

Clear axes of antagonism and complementarity can be found running between the different strategies pursued in our movements. Drawing on the work of Erik Olin Wright (2010), we adopt a simplified typology analysing strategies in terms of those that aim to:

Create alternatives within the system (*symbiotic metamorphosis* in Wright's terms) by building on and reforming existing institutions. Reformist strategies extend and deepen the institutional forms of popular social empowerment, while also offering solutions to practical problems faced by dominant classes and elites. These strategies, associated with the social democratic tradition, often exhibit contradictory characteristics, simultaneously expanding social power and strengthening aspects of the existing system.

Build alternatives outside the system or in its gaps and cracks (*interstitial metamorphosis*) to gradually evolve beyond the limits of the existing structures. Historically connected with the Anarchist tradition, this encompasses some prefigurative initiatives and new forms of social empowerment growing in the cracks and margins of capitalist society, including such disparate projects as autonomous squatted social centres, ecovillages, and alternative economic initiatives.

Rupture the system (*ruptural*) with the hope of rebuilding out of the ruins. Associated by Wright with the revolutionary socialist or communist traditions and the organisation of classes through parties in direct confrontation with the state, the approach envisions creating new institutions of social empowerment through a sharp break with existing institutions and social structures. It implies a radical disjuncture. Less evident today as fully fledged revolutionary organising, ruptural approaches are still very present in the ways they influence the identities of some radical actors and offer a tactical legacy.

	Associated Political Tradition	Pivotal colective actors	Strategic logic in respect to the state	Strategic logic in respect to capitalist class	Metaphors of success
Ruptural	Revolutionary socialism / communism	Classes organised on political parties	Attack the state	Confront the bourgeoisie	War (victories and defeats)
Interstitial metamorphosis	Anarchist	Social movements	Build alternatives outside of the state	Ignore the bourgeoisie	Ecological competition
Symbiotic metamorphosis	Social democratic	Coalitions of social forces and laboour	Use the state: struggle on the terrain of the state	Collaborate with the bourgeoisie	Evolutionary adaptations

Figure 1. 2. Transformative Strategies - Adapted by Ulex project from Wright (2010)

3. Range of roles

Another useful way of thinking about diversity within our movements relates to the wide range of roles involved in building impactful movements. Even though it remains mostly cast within the framework of liberal democracy, we have found that Bill Moyer's typology sheds useful light on a range of movement dynamics. He identifies four key roles: rebel, reformer, citizen, and change agent (1987). Moyer maps these roles onto a timeline that suggests a specific sequence of phases in the life of a movement from 'kick-off' to success. During different phases each role takes on greater or lesser prominence, but through the entire process all have a key part to play. Again, it is useful to note the different organising cultures that characterise these diverse roles – and different types of organisations they can give rise to.

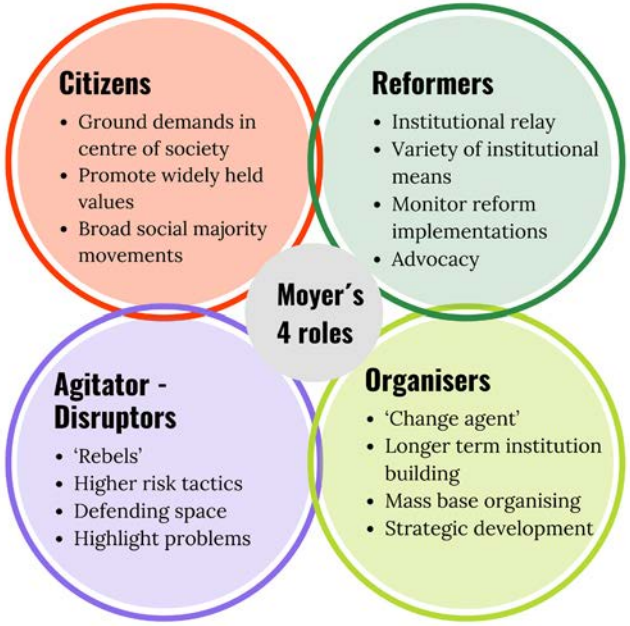


Figure 1. 3. Movement Roles - Adapted by Ulex project Moyer (1987).

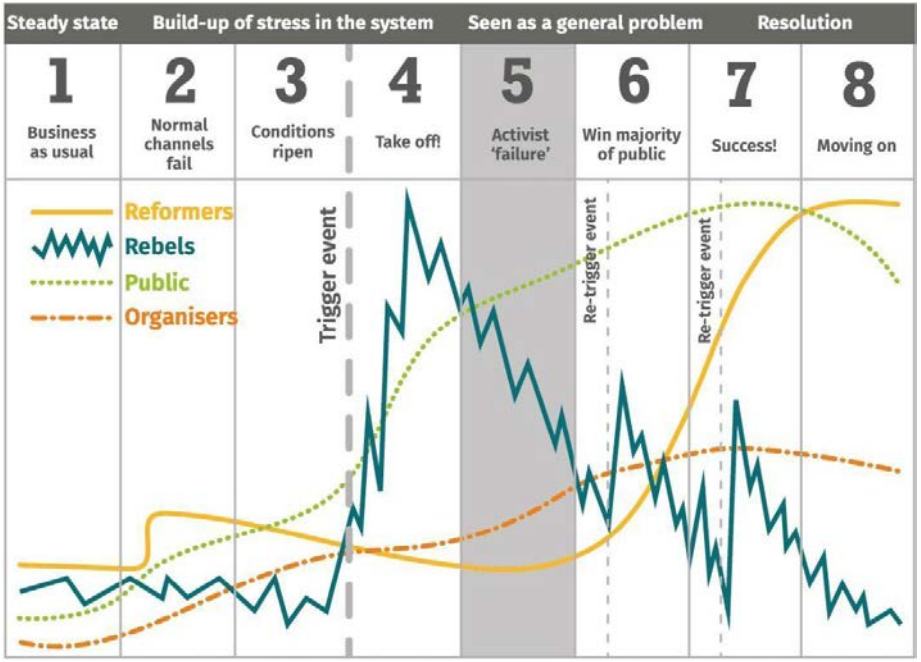


Figure 1. 4. Movement Action Plan - Image adapted by Making Change: What Works Report, p.36 from Moyer (1987).

Of course, we can expand on Moyer's typology to include an enriched sense of the diverse roles that are key to the success of social movements. A member of our training team, Natasha Adams, generated an expanded typology based on research into the history of environmental and LGBTQI+ movements in the UK (2019). Her extended typology adds the roles of news media, thought leaders, artistic and cultural production, and the roles involved in the diverse approaches across grassroots and professional NGO mobilising and organising. Her typology suggests a broadening out of the field of a social movement to include some actors who might not always be identified with it, but whose role, based on her research, has a decisive influence.

4. The interface with everyday life

Another set of factors that shape the diversity of movement ecology relates to the specific social and economic contexts within which different forms of activism are embedded. Another member of our team, Laurence Cox, points out in a paper on Sustainable Activism (2019) that: "Different movements interface with everyday life and social routines in different ways. Put another way, someone's movement participation can be primarily a job, an identity, a part of their everyday culture or working life; and these different situations affect individual activists but also shape movements insofar as most movements have a centre of gravity in one or other of these (perhaps a characteristic of a truly powerful movement is its presence across multiple dimensions)."

He goes on to list these different situations in terms of:

- Workplace-based movements: Peasant and labour struggles are naturally workplace-based, while other types of activism (e.g., sabotage during the European resistance to fascism) can also be centred here
- Community-based movements: Some movements naturally tend to organise within people's residential or social communities – working-class community organising, LGBTQI activism, certain radical sub-cultures, and many ethnic or religious movements, for example
- Professional or full-time activism: In some kinds of movement situations (parties, unions, media, NGOs and so on) many or most activists are employed by movement organisations
- "Leisure" activism: Some kinds of movements take place outside where most of their participants work and live, in the social space otherwise occupied by leisure activities, as might be the case with many people attending protests or taking part in a local chapter of a campaign NGO in their spare time.

Each of these represent different forms of institutionalisation (or lack of it) and organising culture. The different economic relations and dependencies (or lack of them) also have a significant bearing on movement dynamics related to power, resourcing, and types of influence.

Learning activities

At the heart of this module is a mapping activity that helps us to reflect on and analyse the place and relationships between the diverse actors, roles, and contributions described above. The module only offers one activity due to its richness and adaptivity to learning needs. The activity plan includes a comprehensive series of activities and analyses that together will support a deep inquiry into the ecology of social movements – and can be adapted as needed. The activities are designed to be carried out by activists who are embedded in specific movements, beginning the work based on their direct experience and then augmenting that with research and investigation. The mapping activity is itself a strategic analysis of the existing strengths and weaknesses of the chosen movement. As such, it should be used to support strategic thinking about movement building, with learning enhanced by this concrete and practical engagement with existing movement building challenges.

Mapping movement ecology

Movement Mapping is a strategic activity aimed at enhancing activists' understanding of social movement dynamics, emphasising long-term capacity building over short-term interventions. It involves mapping key movement actors, analyzing power dynamics, identifying relationships, and assessing network characteristics. The process helps recognize strengths, weaknesses, identify opportunities for strategic interventions, and inform strategic planning. Movement Mapping complements traditional campaign tools, offering a holistic approach to movement resilience and power-building.

Learning resources

- Adams, N. (2019). *Ecologies of UK Social Movements.*
- Diani, M. (1992). The Concept of Social Movement. *The Sociological Review*, 40(1), 1-25.
- Moyer, B. (1987) *The Movement Action Plan.*
- Tufekci, Z. (2017). *Twitter and teargas: the power and fragility of networks protest.* Yale: Yale University Press.
- Wright, E. O. (2010). *Envisioning Real Utopias.* London: Verso. Ch. 8, 9, 10, 11.

MODULE 2. MOVEMENT TIMELINES

Introduction

Transversal organising requires that people develop skills and find the motivation to take on the challenges of working with people in organisations and movements who might sit outside their usual sphere of engagement. An important source of motivation and learning are the historical precedents in our movements. This module encourages participants to carry out some research into the history of a social movement with which they feel some connection and to explore how power has been built and used. They will learn to identify patterns and to derive learning from the successes and failures of historical precursors and their own previous actions.

Learning aims

- Understand social movements within a historical context
- Build an understanding of ourselves as historical subjects
- Develop awareness of the complex processes of continuity and discontinuity in movement life
- Encourage deep reflection on key concepts such as "movement power" or "movement progress"
- Begin to recognise patterns in the lives of social movements

The histories of our social movements are full of instructive learning. While there are many case studies that we can learn from – such as those included in this curriculum – looking at the movements in which we are directly involved can really bring that learning home. This module offers a framework for learners to research and analyse the history of a movement that they are connected to.

The activities involve choosing a movement to analyse, developing a timeline for that movement and the contexts in which it has evolved, and then choosing a set of key indicators which will help learners to identify patterns and trends.

The first step is to choose a movement for analysis. This in itself requires reflection and thinking about what constitutes a social movement (just as in the first module). We will often share a few quotes about movements and support participants to engage critically with them. Examples include:

> "Following an old law of social evolution, resistance confronts domination, empowerment reacts against powerlessness, and alternative projects challenge the logic embedded in the... existing order." (Castells, 2003)

> "Purposive collective actions whose outcome, in victory as in defeat, transforms the values and institutions of society." (Castells, 2003)

> "A network of informal interactions between a plurality of individuals, groups and/or organisations, engaged in a political or cultural conflict, on the basis of a shared collective identity." (Diani, 1992)

We emphasise that we are not looking for the "right" definition, but using these suggestions by social scientists to help us reflect critically on our experience and understanding.

We also draw attention to the complexity of social change and social movement roles within it. We often use this quote from William Morris to give a sense of the discontinuity and intergenerational nature of many struggles:

> “I pondered all these things, and how people fight and lose the battle, and the thing that they fought for comes about in spite of their defeat, and when it comes turns out not to be what they meant, and other people have to fight for what they meant under another name.” (Morris , 1888)

It can be valuable to take some time to discuss the value of having a sense of the long struggles of which our movements are part and the multiplicity of contributions that have been made over time. This will help people to research the precursors and movement ancestry, helping to place their own work in a longer historical context and supporting people to increase their own sense of acting within an extended timeframe. This can be strategically important as a way to provide an antidote to the pressures that pull us into firefighting and responding to immediate short-term agendas. It can support a shift towards the longer-term strategic capacity building that is all too often neglected. Most struggles which achieve deep structural transformation are intergenerational and involve many years of education, preparation, trial, and error.

It is likely to emerge with some participants that they are uncertain of the boundaries of their own movement as they think back into the past. Does the longer history of “the climate justice movement” only begin at the historical point when “climate justice” emerges from the “environmental movement” as a key term? And is “environmental justice” a movement in itself separate from e.g. ecology movements or earlier struggles of the rural or urban poor? It is worth highlighting such questions if they come up in discussion as they will be important further on in the course.

In addition to gaining a historical perspective, the module also supports deeper reflection on key concepts. The activity requires that people graph the rise and fall of certain factors, including: *movement power*; *movement cohesion*; *progress on issues*; and *opposition*. In order to carry out this analysis, participants need to discuss what they mean by these terms. How do they understand the power of a movement? What forms does opposition take? And so on. Rather than provide definitions, it is valuable to encourage participants to do that work for themselves, to draw out their own assumptions and understanding.

Finally, the module involves analysis of the patterns they see emerging through their movement timeline. Are there relationships between movement power and levels of opposition? Or between progress and cohesion? To help develop this kind of analysis it can be useful to use the Systems Thinking Iceberg model (in the Figure below), which is also described in *Module 6. Surveying the Lie of the Land 4 - Context Analysis and* VUCA.

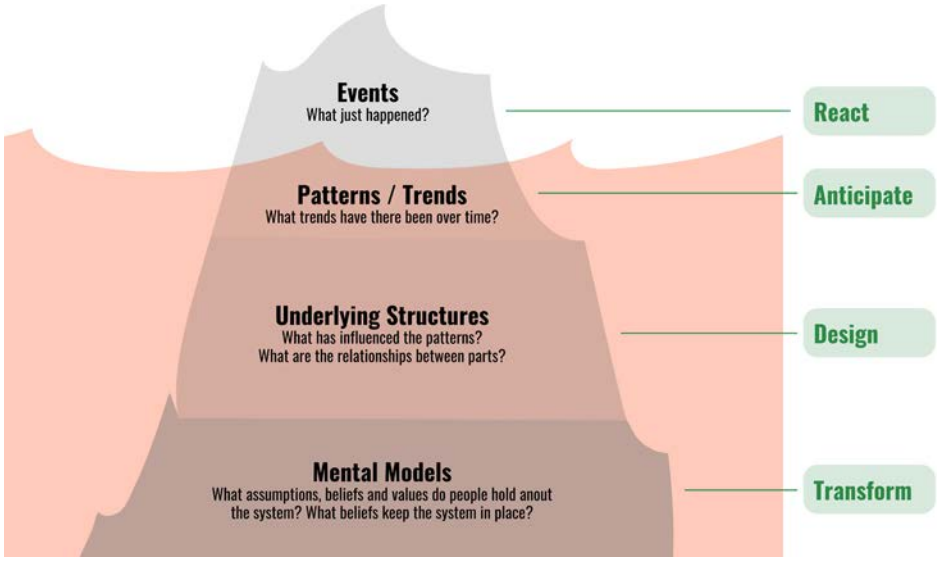


Figure 1. 5. System Thinking Iceberg Model

The Systems Thinking Iceberg model is based on the metaphor of an iceberg with visible and invisible parts and it helps us get under the surface of events and identify e underlying patterns, structures and mental models. It can be particularly useful for analysing the underlying structures of movement timelines, looking at who was involved in different phases and periods of the movement history and how were the relationships among those involved. Participants can use the framework introduced in the mapping activities of *Module 1. Mapping Ecologies of Social Movements*, and use this tool to analyse how relationships, alliances, and coalitions were built between which actors over time.

Learning activity

Movement timelines

Movement Timelines is an extended activity that fosters a deep understanding of social movements in historical contexts, aiming to cultivate participants' awareness of themselves as historical agents. It involves research, the drawing of movement timelines, and subsequent analysis and discussion. The activity can involve a period of preparatory research over some days or weeks. It can be carried out by individuals, but is ideally done by a group of people with a shared connection to a specific movement. This can inform perspectives and future strategies.

Learning resources

Adams, N. (2019). *Ecologies of UK Social Movements.*

Castells M. (2010). *The power of identity* (2. ed. with a new preface). Wiley-Blackwell.

Diani, M. (1992). The Concept of Social Movement. *The Sociological Review*, 40(1), 1-25.

Ecochallenge (2024). *Iceberg Model: Learn about the theory and practice of Systems Thinking.*

Morris W. (1986). *A dream of John Ball; and a king's lesson.* Novel.

MODULE 3. HISTORICAL ALLIANCES

Introduction

Most system-transforming change has come about not from a single movement operating in isolation but from an alliance between different movements and communities in struggle. This is far easier said than done – but learning about the longer history of powerful alliances is an important starting point for thinking about what might be possible today. While module 2 (movement timelines) invites learners to extend their sense of self beyond their own organisation as it is today, and back into the longer history of what they see as their own movement, this module takes the process further and asks participants to situate themselves in a longer history of struggle in many different times and places. This can build confidence around the potential of struggles which have not yet reached this level of power, a greater capacity to reflect on the specifics of participants' own contexts, and an attention to the possibilities of future alliance building.

Learning aims

- Develop the ability to read present-day possibilities for alliance building through the lens of the long history of social change from below
- Develop the capacity to assess where our movements stand in the present moment by applying knowledge of movements and communities as themselves alliances which are constructed, and break apart
- Develop a more realistic understanding of how large-scale power conflicts work in society, at different levels (revolutionary upsurges, periods of reaction, stalemates etc.)
- Create a self-understanding of ourselves as standing in a longer history of popular struggle

Our movements exist in a moment of historical defeat. The forces of an ascendant far right using state and street violence both against our organised movements and against migrants, racialised minorities, women and LGBTQ+ people. They have created an unholy alliance around the interests of fossil fuel, business-as-usual transport and agriculture, and climate denialism. It is leading to ever-increasing corporate power, soaring inequality, and precarisation, as well as an intensifying cycle of warfare and security politics. All of these mark powerful and effective moments of backlash against the past successes of climate, feminist, Black, anti-racist, LGBTQ+, labour, left and other organising from below.

We bear the hallmarks of this defeat. In a period of atomisation and competition between movements, communities in struggle and even individual organisations, most newer activists know very little about each other's struggles and experiences. There are fewer and fewer movement-level publications, spaces for debate and discussion, and strategic encounters. There is more and more dependence on the algorithms of commercial social media platforms, on saying and writing things for money in commercial media and publishing, even in academia. All of this means that most activists are disconnected from the longer history of movements in their own places and spaces. We are desperately focussed on a here-and-now. It is a here-and-now in which we are losing, but where we bend to the need to talk a big game to bring media attention, clicks and likes, donations, invitations, and opportunities. Under these conditions, transversal organising, and imagining ourselves in a longer timeframe, are difficult to say the least.

One step out of being trapped in our own moment of fragmentation, defeat and endless "content" is to think ourselves into a longer history – specifically a history of movements from below and communities in struggle *coming together* in transversal alliances. The alliances we need today are not the same as those of the past - in part because those of the past existed, and helped to shape the present. But putting ourselves back in a different moment can help to give us space to breathe outside the overwhelming reality of our own, very

local, present moment (this issue, this country, this organisation, this media). It allows us to see ourselves from the outside in a way that both affirms the crucial importance of our efforts in the present and allows us to ask where today's activities sit in a longer history.

In face-to-face courses this can be done in a variety of ways. For example, we have used act 3 of Sean O'Casey's *The Plough and the Stars*, which presents some of the very different (and quite ordinary) people involved in making Dublin's 1916 uprising against the British Empire, to bring course participants into a different time and place quite viscerally. We have also used texts from the collection "Voices of 1968" in an exercise inviting participants to imagine themselves as activists in another time and struggle, trying to find a way forward to forge alliances across difference. In this curriculum we suggest a jointly-held exercise of reading and trying to make sense of a past moment of historical alliance. This can be done with a small-group online meeting followed by individual reading and a second meeting.

This particular module has less immediate and "technical" goals than some others, but there are still some key learning points. Most immediately, if we can understand how a powerful movement alliance worked at a different point in time, this can help us to notice possibilities for alliance-building in the present moment which have not yet been developed - and to think about how we could move towards those. What does a meaningful transversal alliance actually look like, how would we know if we had one, and where might we look if we wanted to start working towards one?

If we think about the long history of social change from below, we are able to develop a more realistic and less schematic understanding of how large-scale power conflicts work in society. What does a revolutionary upsurge actually look like when you delve into it? What does a stalemate, or a period of reaction look like? How are these related to the alliance-making capacity of different social actors? How can we see *both* the successes *and* the limitations of past historical alliances?

Figure 1. 6. Protest against the construction of Torness Nuclear Power Station, Scotland, 1978 (Source:Friends of the Earth Scotland, PDM 1.0)

At its simplest, movement alliances from below have:

- Brought about the collapse of absolute monarchy and the end of dynastic empires in Europe, as well as many different kinds of dictatorship;
- Overthrown the European empires that once ruled the world;
- Won formal democratic, human and civil rights;
- Brought about welfare states, mass education and health provision and labour rights;
- Created formal equality for women and LGBTQ+ people in many areas;
- Defeated fascism and Apartheid;
- Won verbal commitments to ecological protection with real wins in some areas (e.g. nuclear power, leaded petrol, CFCs).

As we know, many of these gains were only partial, and forces are hard at work across the continent trying to even roll those back. Many past victories were won in a "two steps forward, one step back" process over decades, alongside moments of dramatic advance. Yet at the same time as we are bitterly aware of the paradoxes of history, so many of our demands are about making these gains more real – decolonisation, real democracy, a living wage, driving fascism and genocide back, actual ecological sustainability etc. The struggle continues – but we understand nothing if we don't notice that "continues" means that we are not the first people to engage in this struggle.

Serious political thinking involves having a good, grounded sense of how effective an alliance is needed to make even limited and ambiguous political changes against sustained and powerful opposition. Seeing ourselves as standing in a longer history of popular struggle can help us to be more patient with ourselves and each other, to have a less brittle and more grounded confidence for the long haul, and to see both the scale of what is at stake and the different kinds of wins that we need to really make a difference. If we have, in the past, committed ourselves to an all-or-nothing, now-or-never strategy which has failed, but we have not given up on the challenge, it can help us sustain hope.

As can be seen, much of this is more easily "caught than taught" – saying this usually has little effect, but activists who are putting energy into learning about transversal organising are probably already doing some of the work themselves. To some extent they have not given up, they have recognised what is needed politically, and they are willing to put time into something that gives a bit of distance and space for reflection. Facilitators should not be too upset if participants also express despair and cynicism or react furiously to what can sound like facile consolation. Very often participants want to be convinced (or at times they do not want to be fooled twice). The point of this module is not to talk people into believing something. It is to invite them into standing in a wider history, before returning in the next module to something a bit closer to home.

Finally, an important element of this, already lifted up in *Module 2. Movement Timelines*, is to understand that "my movement" as one defines it is not as fixed and "given" a thing as one might imagine. Perhaps someone imagines that their organisation *is* "the movement," or that "the movement" is narrowly defined in language that is less than a decade old. Or perhaps someone thinks that what they know about "the movement" in their own country and language is true for everyone else everywhere.

Fundamentally, looking at transversal movement alliances in the past *also* shows us that "movements" and "communities" are always themselves transversal alliances. For example, racialised "communities" include people from different geographical locations (even if all in the same country of origin), different genders, different social classes; "LGBTQ+ communities" show their inner complexity in the name, as do "unions" of workers in different jobs, at different levels, with different degrees of security, in different places, with different employers.

"Movements" too are always being constructed. Activists network across different organisations, develop trans-local and trans-national alliances. They discover that different issues are connected, and they bring together people whose social positionalities mean that they relate to a theme differently. And in turn these people broaden the theme and the way the movement describes itself.

Or movements are breaking apart. People insist on the differences, highlighting perceived betrayals. They engage in organisational patriotism and individual career-building. They seek alliances with powerful and wealthy groups or look for the moral high ground at the expense of actually winning. Seeing this full picture can help us to relativise our sense of "my movement" as neatly fixed and boundaried. It can help us look for possibilities of developing and changing not just what we call the movement, but the world we live in.

Learning activity

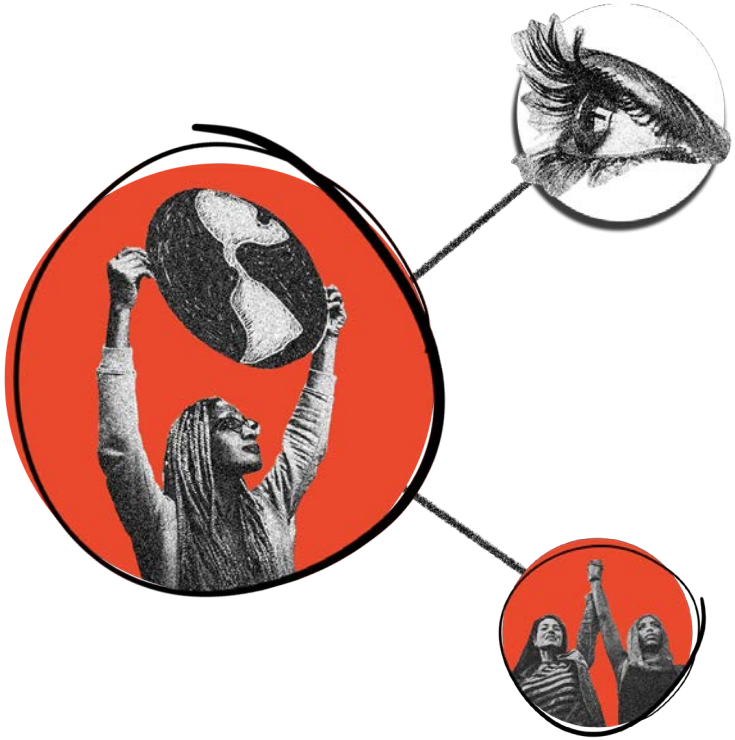
Historical alliances

This exercise involves working together in small groups to really dig into a specific case of transversal organising across organisations, movements, social positionalities, political traditions and/or geographies. Participants select a case, do some initial research and discuss it together. The activity can also be done individually.

Learning resources

The learning resources below could be used as possible preliminary learning activities. Some offer examples of historical alliances (Barca, 2012; EZLN, 2021; Darcy, & Cox, 2019; Zitouni, 2014; Lorde, 2012; and Thompson, 1982), others explain why social movements matter (Cox, 2018) and others highlight the many different voices that have to be heard in a new movement alliance (Cox, 2019).

- Barca, S. (2012). On working-class environmentalism: a historical and transnational overview. *Interface*, 4 (2): 61 – 80.
- Cox, L. (2018). Why social movements matter. *Colloquium*.
- Cox, L. (2019). The revolutionary challenge of "the long 1968". *Roar Magazine*.
- Dalby, S. (1985). *The Nuclear Syndrome: Victory for the Irish Anti-nuclear Power Movement*. Tripod.
- Darcy, H. & Cox, L. (2019). Resisting Shell in Ireland: making and remaking alliances between communities, movements and activists under fire. *In Environmental Justice, Popular Struggle and Community Development*.
- EZLN (2021). A declaration … for life. Radio Zapatista.
- Lorde, A. (2012). Learning from the 60s. *BlackPast*.
- Thompson, E. P. (1982). *Beyond the Cold War*. London: Merlin Press.
- Zitouni, B. (2014). Planetary destruction, ecofeminists and transformative politics in the early 1980s. *Interface*, 6 (2), 244 – 270.



MODULE 4: WORKING WITH DIVERSE TRANSFORMATIVE STRATEGIES

Introduction

Fragmentation and an inability to cooperate often undermine our movement building. Even where transversal alliances are formed, antagonism and adversarial attitudes between movement actors deplete energy and erode trust. The breaking down of cooperative relationships happens along different axes, but one of the most common sources of antagonism relates to views and positions on long-term and large-scale strategies for change. This module looks at some of the different strategies that have been important in our movement histories and that continue to exert an influence today. It asks us to reflect on some of these approaches, think about our relationship to them, and examine how related attitudes can contribute to unhelpful tensions. We are encouraged to go beyond the polarising tendencies that can arise and to find ways to transform energy depleting antagonism into more appreciative relationships, to turn dysfunctional conflicts into creative tensions, and to recognise the complementarity that different strategies can offer.

Learning aims

- Identify a range of transformative strategies within movement ecology
- Support shifts from unhelpful, antagonistic attitudes to different approaches, towards appreciation of potential complementarity and synergy
- Reflect on tendencies to polarise and attach unhelpfully to certain political identities, and to loosen this towards a pragmatic approach to building power
- Break out of tendencies that can fragment and undermine our movement building work
- Develop self-awareness and emotional literacy for working across political identities

In *Module 1. Mapping Ecologies of Social Movements*, we looked at the diversity of actors within the ecology of social movements. One of the typologies that we introduced was based on the work of Eric Olin Wright's idea of diverse transformative strategies. In this module we revisit that framework and explore how alignment with these historical approaches can influence our attempts to organise transversally.

All of us involved in social movements for some years will have encountered situations where suspicion, dismissive attitudes, and deprecating criticism between different movement actors leads to conflict, avoidance of each other, and an inability to find the basis for effective cooperation. Many factors can play into these dynamics, but a common basis for such attitudes and behaviours are the ways that people align with certain historical traditions, and the vision they have of how large-scale change can be achieved, while adopting highly critical perspectives about other approaches.

Clearly, critical exploration of political ideas and assumptions plays an important role in our ability to learn from experience and improve our analysis and practice. At times, however, affiliations to certain positions can become entrenched in unhelpful ways, leading to dogmatism and polarisation. As José Mujica, the widely respected Uruguayan activist and ex-president once remarked, "the great misfortune of the left in the world today is that while they are divided by ideas the right are united by interests". Political positioning can be more about providing a personal sense of belonging and certainty than serving our interests to build effective collective agency amidst the complex and often contradictory historical conditions we work within.

Given the messy and multifaceted nature of social change, the seemingly inevitable incomplete and compromised nature of our successes and gains, and the historical failure of blueprints to provide adequate guides to the future, it might be wise to treat settled positions more circumspectly. While our views helpfully shape our practice and provide important frameworks for analysis and a sense of direction, it is important to recognise the always partial and provisional

nature of our understanding. This can help us to continue to test our assumptions in experience and recognise that solutions to the gnarly problems of social transformation are unlikely to fit neatly into a narrow ideological package.

The volatile, uncertain, complex, and ambiguous nature of social change (see Movement Strategy Section for more on this), means that a multiplicity of approaches is more likely to increase our movement ability to respond to changing circumstances and build the wide range of capabilities needed to exert our collective agency. This is not only true in terms of the range of contributions, roles, and actors needed in a healthy movement ecology (as explored in *Module 1. Mapping Ecologies of Social Movements*) , but also in terms of the diversity of large scale strategies present.

While some movement actors align with what they see as pragmatic processes of reform, others identify with radical revolutionary practices or the creation of spaces and communities that seek to step outside or go beyond the existing system. While each approach has its limitations, they can, under certain conditions, all offer important contributions to our movement development. Although commonly "divided by ideas," in practice, there can be important complementarities between them. And in other cases, where real differences of interest or prioritisation exist, these tensions can be used creatively and generatively, rather than experienced solely as sources of conflict.

Too often, however, we encounter simplistic views of each other where some actors regard others as merely sell-outs or victims of institutional co-option, while in turn, others look down on their critics as naive idealists hanging on to radical views long disproven by history. Yet others are regarded as escapists who mistake privileged withdrawal for the creation of a counter-culture. While these views often contain elements of truth, they also commonly deteriorate into caricature or stereo-typing. In this module we'll explore some of these common dynamics and the value of shifting some of these patterns in ways that will support better cooperation or forms of coexistence that are, at the very least, less depleting.

Let's turn again to the framework developed by Eric Olin Wright in his book Envisioning Real Utopias (Wright, 2010) that we introduced in *Module 1. Mapping Ecologies of Social Movements*. There we used it as a typology for analysing some of the defining characteristics that mark important differences in our movements. Here we'll build on that to help us look at the axes of antagonism and complementarity that can be found running between the different strategies pursued in our movements. Taking a historical view, Wright identifies three "families" of strategies towards deep structural transformation. He uses the terms *symbiotic metamorphosis, interstitial metamorphosis, and ruptural.* These are each described in terms of 1) their association with political traditions, 2) the pivotal collective actors involved, 3) their strategic logic in respect to the state, 4) their strategic logic in respect to the capitalist class, and 5) their metaphors of success.

Taking some liberties with Wright's work, we can simplify the typology to categorise strategies in terms of those that aim to:

Create alternatives within the system (*symbiotic metamorphosis* in Wright's terms) by building on and reforming existing institutions. Reformist strategies extend and deepen the institutional forms of popular social empowerment, while also offering solutions to practical problems faced by dominant classes and elites. These strategies often exhibit contradictory characteristics, simultaneously expanding social power and strengthening aspects of the existing system.

Build alternatives outside the system or in its gaps and cracks (*interstitial metamorphosis*) to gradually evolve beyond the limits of the existing structures. Historically connected with the Anarchist tradition, this encompasses some prefigurative initiatives and new forms of social empowerment growing in the cracks and margins of capitalist society, including such disparate projects as autonomous squatted social centres, ecovillages, and alternative economic initiatives.

Rupture the system (*ruptural*) with the hope of rebuilding out of the ruins. Associated with the revolutionary socialist or communist traditions and the organisation of classes through parties in direct confrontation with the state, the approach envisions creating new institutions of social empowerment through a sharp break with existing institutions and social structures. It implies a radical disjuncture. Less evident today as fully fledged revolutionary organising, ruptural approaches are still very present in the ways they influences the identities of some radical actors and offer a tactical legacy.

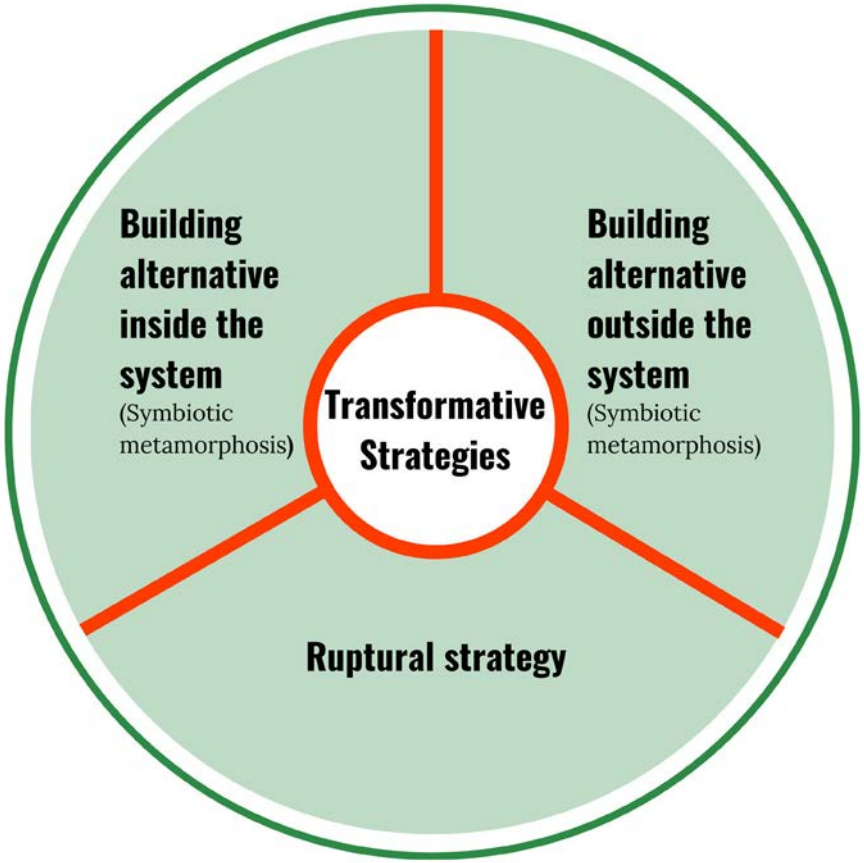


Figure 1. 7. Transformative Strategies - Adapted by Ulex project from Wright (2010)

In this module participants are supported to examine their own relationship to these traditions and transformative strategies, recognise the differe+nt contributions each of them can bring to our movement ecology, and make some shifts in their attitudes that can underpin new practices better able to work creatively with this kind of diversity.

None of this assumes that we can or should aim to avoid all antagonisms within our movements. There will be choices that are made and actions taken that are incompatible with each other. Nevertheless, we do suggest that too often we find ourselves falling into habitual polarisation and conflict that is counterproductive, unhelpful, and more a reflection of personal or group limitations than deep strategic thinking. The module aims to help people to find ways to equip themselves and their colleagues to take a more strategic approach that goes beyond self-serving posturing and develop a more informed approach to building relationships across differences within our movements.

Learning activities

Theories of change spectrum lines

The activities firstly encourage participants to reflect on the interplay between different practices and theories of change. Then, with an enriched sense of the complexity of approaches and factors, they reflect on their own alignment to different traditions and approaches, the critical attitudes they hold and witness, and then shift towards a more appreciative inquiry of contributions and potential complementarities.

Exploring an ecology of strategies

Ecology of Strategies is an activity that aims to explore diverse transformative strategies within social movements, emphasizing the shift from antagonistic attitudes to appreciating complementarity. Participants categorize themselves based on strategic affinity based on Eric Olin Wright's typology of transformative strategies (creating alternatives within the system, building alternatives outside the system, and ruptural strategies). Through interactive exercises, participants engage in playful critiques and appreciations of other approaches, fostering understanding of complementarities of different approaches and shift from divisive attitudes to collaborative movement building.

Learning resources

- Wright, E. O. (2010). *Envisioning Real Utopias*. London: Verso. Ch. 8, 9, 10, 11.

MODULE 5: WORKING WITH POWER AND INEQUALITIES WITHIN OUR MOVEMENTS

Introduction

As experienced activists we will be conscious of the reality of unequal distribution of power, availability of resources, and access to opportunities across our movements. Some of these differences relate to organisational types and histories, seen commonly in the discrepancies between larger well-funded NGOs and grassroots initiatives. They also relate to ongoing dynamics of power and privilege between organisations, groups, different struggles and networks. We will be familiar with the challenges of working with power and privilege dynamics within our groups and organisations. These challenges can become even more difficult to address when we are engaged in transversal movement building, aiming to build connections beyond our existing communities and more trusted relationships. This module aims to offer perspectives, tools, and skills that might help us participate in addressing these challenges more effectively.

Learning aims

- Deepen understanding of power and privilege within social movements and the dynamics of mainstream and margins
- Apply a skillsets framework for diagnosing and analysing movement problems of movement building and strengthen inclusion and diversity
- Enhance awareness of identity formation in social movements and how they influence movement dynamics
- Gain and apply skills to navigate complex dynamics in relationships and alliances in movements in the context of structural inequality

Going beyond the basics

This module will introduce some frameworks and ideas that can help us work more effectively with some of the complex dynamics that arise when we seek to address power and privilege dynamics in our movement work. It assumes a basic understanding of the concepts of power, privilege, and structural oppression. We don't propose to cover these basics here, but to ensure we are starting on the same page the following list makes explicit some of our assumptions:

- When we speak about "oppression", we understand it in terms of *systems of structural power that have been established historically and give certain constituted groups of people influence and dominance over, and at the expense of, others.*
- These systems of power are *structural* in the sense that they are built into and perpetuated through *specific institutions* and *reinforcing cultural norms*.
- These institutions can include forms of government, education systems, economic structures, religions, and laws. And within our groups, they show up in the ways decisions are made, how power is distributed, our economic relationships, and the ways certain voices are valued over others.
- Examples of these forms of oppression include racism, patriarchy and heteronormativity, ableism, class, and so on.
- Institutional structures tend to embody particular beliefs about the world and humanity, which often coalesce as ideologies. Whereas ideologies are generally conscious, social systems are also underpinned by less conscious preferences and assumptions which manifest through cultural norms (for example through the performance of gender roles or individualistic competitiveness). Through the process of socialisation we unconsciously internalise these norms in ways that both shape who we are and that further reproduce them throughout society.

If any of this is new to you or the learners you'll work with, this module isn't for you. Instead, we recommend you start by exploring more basic material on anti-oppression and power and privilege awareness raising such as NEON's Power and Privilege Guide – and then come back to this afterwards.

Active solidarity and building alliances across communities

In order to transform the structures and cultures that perpetuate oppression and inequalities in the distribution and access to resources and power, we'll need to build alliances across communities and groups whose relationships and experiences are shaped by those wider social patterns. As we attempt to do that it's inevitable that in some ways we will unhelpfully reproduce dynamics of power, privilege, and structural oppression within our movement building work. We'll also experience how difficult changing these patterns can be. Although it can be important and necessary, it isn't enough to be able to name the existence of these dynamics or to call out behaviour that reproduces them. We need to develop skills and understanding to transform them and to sustain our commitment to doing so, despite how hard it can feel.

Too often we can see well intentioned efforts to address dynamics of oppression falling into ruts of blaming and shaming, guilt-based saviourism, and virtue signalling that passes for genuine allyship. To equip ourselves to get beyond these common pitfalls, we need to develop a sophisticated understanding of the psychosocial dynamics at play in ourselves and those we try to work with.

An important place to start is clarification of our values. In recent years the Ulex Project has been moving away from the language of *anti-oppression work* towards the idea of *active solidarity*. This shift in terminology isn't meant to take attention away from practices that challenge oppression and build spaces that are freer of them. But it does encourage moving beyond seeing this work as solely about engaging in struggles between competing self-interest towards approaches deeply rooted in the values of mutual solidarity. For us this requires a recognition that the well-being of each of us is intimately connected and that what genuinely supports the wellbeing of one need not be at the expense of the other. It assumes that a world free of oppression is advantageous to all of us and that the liberation of each of us is inextricably bound together.

Shaped, as our relationships are, by structural injustice, it can be difficult to trust the integrity of those we encounter in our movement building. Ultimately that trust needs to be built through material changes in resource distribution, the witnessing of diverse voices being valued, and tangible shifts related to influence and decision making. Inevitably, we will encounter resistance to changing power relations in these ways and reluctance to let go of certain historical advantages. At times our response will need to involve adversarial strategies and conflict. But if we want to navigate that resistance in ways that can lead to relationships of genuine solidarity within diverse movements, we need to be able to avoid habitual polarisation and be capable of choosing such responses more strategically. Grounded in values of solidarity, we'll find ourselves better able to differentiate between the times when patience is required to support productive change and times when we need to push harder against avoiding tough conversations. We will need to be more able to consciously choose the actions we take and ensure they are more skillful and appropriate to achieve the outcomes we seek.

However, aligning our intentions with values isn't enough. We also need skill and understanding to support transformative action. These skills are both political and psychosocial. Oppression isn't an abstract concept. It is a lived reality. It's a reality that, on one hand, results in harm and wounding. On the other hand, it can compound a lack of awareness of privilege. These two results of systemic oppression work in tandem. The simultaneous presence of these experiences in our groups can give rise to seemingly irresolvable conflicts and tensions shaped by the interplay of trauma, righteousness, denial, and guilt. Building alliances and collaborative movement relationships that can avoid becoming

entrenched in these dynamics involves developing our understanding beyond the basics of power and privilege to incorporate skill and sensitivity related to trauma, wounding, the way identities related to oppression and political agency play out in our movements, and processes of healing, empowerment, and effective allyship. Embodying these understandings is a pre-condition for building diverse and multi-tendency movements with the power to transform society.

Struggles and identity

> "There is no such thing as a single-issue struggle because we do not live single-issue lives. Our struggles are particular, but we are not alone. We are not perfect, but we are stronger and wiser than the sum of our errors." (Lorde, 1982)

Figure 1. 8. Audre Lorde (Source: Elsa Dorfman, CC BY-SA 3.0)

In a recent interview with Judith Butler, renowned for their work on gender and identity, they stated: "My own political view is that identity ought not to be the foundation for politics". And yet, like most of us, Butler knows all too well the central role identity plays in our struggles to redefine "what justice, equality, and freedom can and should mean". As Manuel Castells pointed out back in 2003, a "crisis of political legitimacy has created a vacuum in the mechanisms of political representation and social mobilisation that is being filled with identity-based movements", which have become increasingly prominent during the last couple of decades. The tensions that arise between diverse social and political identities represent one of the most challenging dimensions of ecology of movements work. Addressing these challenges requires a nuanced understanding of both the political and psychosocial formation and function of identity within our movements.

One of the frameworks we can use to shed light on the different ways identity formation functions within the constant struggle over power in society comes from Castells' trilogy on *The Information Age* (2003), which names three "forms and origins of identity building" (elaborated in the following table).

Three forms and origins of identity building (by Manuel Castells)

- **Legitimising identity:** shaped and maintained by the dominant institutions to underpin and reinforce their dominance (e.g. forms of nationalism, dominant group ethnicity, fixed gender roles, etc, but also, in more progressive contexts, legitimising identities can serve to support more just or egalitarian systems).
- **Resistance identity:** shaped by marginalised group or actors disfavoured "by the logic of domination, thus building trenches of resistance and survival on the basis of principles different from, or opposed to, those permeating the institutions of society" (e.g. religious fundamentalism, identity-based rights movements, far right reconstruction of traditional values, etc).
- **Project identity:** shaped by social actors seeking to "build a new identity that redefines their position in society and, by so doing, seek the transformation of overall social structure" (e.g. feminism moving beyond just women's rights to fighting against a broader understanding of patriarchy, some environmentalism, anti-capitalism, etc).

It is important to recognise how all three forms can overlap and even change position. Project identities can grow out of resistance identities, and if either gain preeminence can themselves become new forms of legitimising identity. As patterns of social dominance shift, previously legitimising identities can become the basis of resistance identities (e.g. recent far right leveraging of ethno-religious or nationalist interests in the face of the dominant forces of liberal globalisation, for example).

Identity formation is integral to movement building, creating the sense of the "we" who constitute it or are represented by it. Activist identity defines what "we" stand for, the kind of world "we" aim to create, and the kind of people "we" want to do that with. Actors within movements often use the struggles they are involved in as a primary identifier, such as the *environmental movement* or *feminist movement*, and qualifying variants to specify particular analysis or approaches, such as the *climate justice movement* or *radical feminists*. Similarly, identity coalesces around membership of specific social groups, either as defined by structures of oppression or as constituted as part of their own empowerment by oppressed groups themselves. The articulation of these social groups and the experience of being members of them shape group dynamics within our movements and society at large. This kind of articulation and identification can enable us to build collective power and to find belonging and meaning in our struggles. And yet, mixed in with these empowering functions, there are psychosocial dynamics related to activist identity that are central to burning us out, breaking up our groups, fragmenting our movements, and consequently undermining our resilience and effectiveness.

To shed light on these dynamics, it can be useful to add to Castells' model a further distinction between three modalities of identity formation that we often encounter in movement life, which we can call *empowering, limiting, and liberating* (elaborated in the following table).

Three modalities of identity formation

- **Empowering identities** are those that constitute political communities based on a recognition of shared grievances and a vision of how to resolve those grievances, as well as strengthening the sense of personal and collective agency needed to achieve it.
- **Limiting identities** are where certain psychosocial dynamics cause empowering identities to become stuck, undermining our ability to build connections with those outside our group or forge the alliances and coalitions needed for deeper social transformation, or to renew identity as circumstances change.
- **Liberating identities** arise where we are able to weaken the tendencies leading to limiting identities through recognising the non-essential and conditioned nature of our empowering identities and thereby become better equipped to work across differences, embrace diversity and transversality, and allow our sense of self and community to evolve and adapt responsively – enhancing our potential to realise radical transformation.

This model seeks to integrate an understanding of the socio-political aspects of identity formation with the psychosocial dynamics involved. The construction of political or social identities always involves drawing boundaries of inclusion and exclusion – the creation of an "us" and a "them". The inclusion aspect enables us to find belonging, security and a sense of community. When identity reinforces a positive self-view, as part of something meaningful, and enhances collective agency, it serves to empower us. The exclusion aspect involves the construction of "them", our adversaries, what we are not and are against. It reveals latent conflict and clarifies antagonism as a potentially important step in the process of social change. In the context of building transversal movements, the challenge and the opportunity is to construct a "bigger we" – that largest, most inclusive conception of the "us" around which we can build solidarity – and to have an "us" defined by a sharp political analysis, not the forces of reaction.

This inclusion-exclusion dynamic is inherent in all identity formation. The psychological process of individuation itself necessitates the formation of boundaries in the development of a healthy sense of self. Likewise, the formation of politically empowering identities often involves rejecting identities imposed by an oppressive system and claiming the right to redefine ourselves. Through this process we assert what we are and want to become, as well as specifying what we are not.

Although part of a healthy identity formation process, the complex of socio-political and psychosocial strategies, involving an interplay of both conscious and unconscious dimensions, all too easily deteriorate from empowering "differentiation" into less productive forms of polarisation and "othering". The very inclusion-exclusion dynamics that enable us to constitute empowering identities can also lead us to become stuck, isolated, and disempowered. This is what we mean by limiting identities.

Developing healthy movement ecologies intersects with the development of practices that enable us to avoid the traps of limiting identities and the cultivation of liberating identities. These are simply empowering identities held with greater awareness of their constructed and non-essential nature, and increased clarity about their psychosocial and political function. And yet, cultivating this kind of awareness requires a holistic approach that can attend to the socio-political dimension without losing sight of the psychological, emotional, and even existential drivers of identity formation and attachment. Constructing liberating identities involves socio-political analysis, as well as practices and communities where healing, self-awareness, and psychological integration are nurtured. These kinds of insights highlight the interplay between the intra-personal, interpersonal, and socio-political dimensions of activist practice. They help to underscore our sense that movement capacity building needs to simultaneously attend to our organisational cultures, the development of ourselves as individuals, and to movement-level strategy.

Activities related to this module should support reflection on these aspects of identity formation and related dynamics, helping us to increase self-awareness of how they shape our own participation in movement building, as well as being able to take account of how they play out in the way others engage.

Active solidarity skillset for movement building

Our failures to transform relationships within our movements to satisfactorily address the reproduction of oppression can lead to disillusionment and deep frustration. All too often we see attempts to address the reproduction of oppression stall in patterns of shame, blame, denial, and guilt. All too often we walk away nursing new wounds opened up in the messy processes of attempting to name, challenge, listen, and transform. All too often these processes get stuck in polarised challenge and defence patterns, undermining our ability to build alliances and movements able to address the deep structural causes of the injustice we are fighting.

A common response is to try to "park" the issues, arguing that we need to give priority to our overarching political objectives. Another response is to postpone the wider political projects while we try to work through our internal tensions first. But neither are really adequate. There is a simple truth that however much effort we put into our internal anti-oppression work, to the extent that we continue to live within a wider social context of injustice and socialisation based on racism, sexism, ableism and so on, these influences will always bleed into our groups and movements. Thousands of years of patriarchy cannot be resolved through internal group work, but only by long term social transformation built on deep structural change. At the same time, we cannot postpone efforts to address oppressive dynamics within our groups and movements until "*after the revolution*". We need to attend to them so that everyone can bring themselves fully into our movement work and to strengthen the relationships and trust building that supports alliances. And, although our efforts today will be incomplete, the way we work together now will shape our future. While we need to keep our ambition for deep structural transformation in focus, we must also ensure our means are simultaneously goals in themselves.

So, if we are going to avoid both the inadequacies of sidelining efforts to transform oppressive dynamics or having our transformative ambition reduced to a merely insular focus on group and movement dynamics, we are clearly going to need to bring a lot more skill to active solidarity work than we often witness.

One resource we have found of real value is a *skillsets framework* developed by Leticia Nieto in her book *Beyond Inclusion, Beyond Empowerment* (Nieto, & Boyer, 2014). It offers valuable tools for analysing our own experience, diagnosing dynamics arising between people, evaluating barriers and opportunities for collaboration, and finding effective strategies for working through difficulties. It recognises that each of us can move through different phases in our ability to act in relation to dynamics of oppression. These abilities or skillsets differ according to whether we are members of discriminated or marginalised groups (targets of oppression) or members of privileged groups (agents of oppression). In both cases we can move from less conscious to more conscious agency, from habit to choice, and from being merely shaped by conditions to becoming proactive agents able to practise more transformative skills. As part of this module we recommend three articles by Nieto and a learning activity that explores the framework.

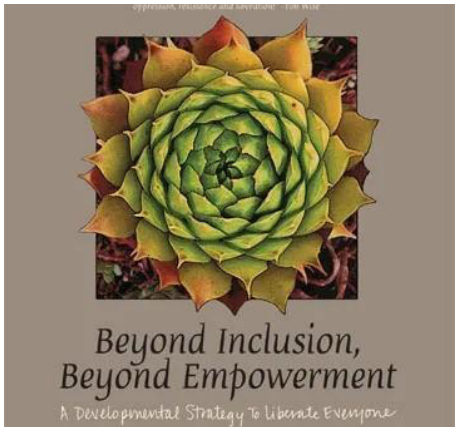


Figure 1. 10. Book cover of Nieto, L., & Boyer, F. B. (2014). Beyond inclusion beyond empowerment: a developmental strategy to liberate everyone.

The framework distinguishes between targets of oppression and agents of oppression, pointing out (in an intersectional way) that we are all both targets and agents in different spheres of our lives and moments in our personal histories. Each of these groups has a range of skillsets which can be developed and employed through different life phases and circumstances. Active Solidarity Skillset (By Leticia Nieto)

Active Solidarity Skillset (By Leticia Nieto)

For targets of oppression these skillsets are:

- **Survival:** Enables people to survive by conforming and unconsciously agreeing with norms.
- **Confusion:** People begin to see the privilege dynamics but lack the language/support to make full sense of it.
- **Empowerment:** People recognise the dynamics of oppression at work in relation to a specific target group identity. Pushing back against that oppression becomes central to their experience.
- **Strategy:** People become able to choose their battles. With more freedom to make choices, they are better at conserving energy and maximising effectiveness. They become able to ally with other target groups.
- **Recentering:** Centring a strong connection to an inner sense of values, people are no longer reactive and are guided by an ethical compass towards systemic transformation.

For agents of oppression the skillsets are:

- **Indifference:** People are able to not notice the existence of targets and their life conditions, and the whole system of power and privilege.
- **Distancing:** Allows people to hold members of the target group at arm's length, through romanticisation, vilification, or simple othering.
- **Inclusion:** Here the focus is on the similarities between target group members and ourselves and emphasise similarity and connection ("We're all children of God," "fundamentally, we're all the same,") in ways that obfuscate our different experience of oppression and privilege, but let us feel some comfort in superficial solidarity.
- **Awareness:** This involves moving well out of our comfort zone and is a difficult transition that we're unlikely to make without a powerful motivation. It can initially be experienced as unpleasant, leaving people feeling paralyzed and even disoriented by emotions such as guilt and shame.
- **Allyship:** People are fully aware of the reality of oppression and privilege, and how it manifests within and between us. They are also able to recognise the dehumanising effect this has on all of us and can choose to consciously work against oppression, while increasingly becoming comfortable when experiencing discomfort related to power and privilege dynamics.

Within our movement there will be people using this full range of skillsets and while the ideal we are likely to prefer is the interplay between the *strategy* or *recentering* and *allyship* skillsets, the reality will often be quite different. Nieto's work gives us tools to analyse our own use of skillsets, and recognise when and why we might drop back into skillsets like *distancing* or *empowerment*. It can also offer a diagnostic tool to help us make sense of the gnarly tangles that we witness, and equip us with understanding that can support a more nuanced and helpful response.

Mainstream and margins

Mainstreams and margins is another valuable framework for looking at more subtle power dynamics and gaining skills to work with them. All groups tend to generate mainstreams and margins. Mainstreams define which styles of communication are valued, who is listened to and who is given less respect, as well as establishing a raft of cultural norms that people are expected to conform to. No matter how homogeneous a group or organisation is, close observation will show that, alongside a mainstream, some characteristics or qualities in the group are marginalised. As a group evolves over time, different qualities

will shift between the mainstream and the margins, so the dynamic is always changing. Without the mainstream a group wouldn't exist, however without the margins a group wouldn't grow. In the short term, a group can grow by increasing the size of its mainstream, but for long-term sustainability, a group will grow by supporting its margins to participate on their own terms.

The mainstream of a group will not always reflect the mainstream in wider society. In fact, within activist organisations, group mainstreams can actually define themselves in opposition to societal mainstreams and those who don't conform to the alternative norms of activist sub-cultures can find themselves on the margins. Learning to recognise and map these dynamics within our movement building spaces is an essential part of creating spaces for engagement, inclusion, and collaboration across diverse groups and actors.

Developing a Trauma informed approach

Although this module covers a lot of ground, there are inevitably some important topics we are unable to include. One of the most relevant is knowledge and skills needed to include a trauma informed approach to our movement building. Oppression and injustice leave its mark. Wounds then shape our future responses, ability to trust, and need to protect ourselves from further harm. While this is natural and healthy, it can also require sensitivity and awareness to take account of these factors as we build spaces for collaboration and relationship building. An introduction to these issues can be found in Chapter Seven of Ulex's Climate Justice Psycho Social Resilience Manual.

Learning activities

This module covers a lot of ground. Matching this we recommend a wide range of learning activities. Some simply involve reading resources and discussing them. Others can touch on areas of sensitivity and have the potential to elicit some challenging emotions. Trainers are encouraged to think carefully about their capacity to open up such discussions and the resources and support they need to do so responsibly.

Exploring Leticia Nieto's Skillsets for Targets and Agents of Oppression

This activity offers a process that can be used to explore Nieto's framework and apply it to our experience. It uses analysis of case studies from our personal experience to help us develop our ability to use the skillsets framework as an analytic tool for better understanding the complexity of dynamics related to power and privilege.

Reflections on identity

Activists reflect on the historical movements that shaped their activism, identifying up to three significant moments. They explore the relevance of past events, organisations, and struggles, considering their inspiration, learning, and connection to current activism. Questions arise on how this history informs and guides contemporary organising efforts.

Mainstreams and margins in social movement cultures

Mapping mainstreams and margins is an activity that aims to deepen understanding of group dynamics by highlighting the shifting roles of mainstream and marginal elements within movements. It emphasises that both the mainstream of a movement, which sets group norms and tone, and the margins, which drive innovation and growth, are essential for a group's vitality. Through mapping and reflection exercises, participants learn to appreciate the value of diversity, understand privilege dynamics, and develop strategies for more inclusive engagement.

Exploring privilege and rank

This activity offers a framework for better understanding power dynamics and the multiplicity of factors that contribute towards them. The idea of rank draws attention to the interplay of structural, psychological, and contextual factors at play.

Reading and discussion on allyship

This activity simply involves participants reading several articles related to the theme of allyship and then engaging in facilitated discussion to explore key themes and relate the authors positions and experience to their own.

Learning resources

- Mindell, A. (1995). *Sitting in the fire : large group transformation using conflict and diversity*. Deep Democracy Exchange.
- NEON (2015). Power and Privilege: A handbook for political organisers.
- Nieto, L., & Boyer, F. B. (2014). *Beyond inclusion beyond empowerment: a developmental strategy to liberate everyone.*
- Ulex Project (2016). Anti-oppression toolkit: A facilitators' Guide.
- Ulex Project (2022). Sustaining the Climate Justice Movement: A Psychosocial Resilience and Regenerative Activism Training Manual.
- Zegg Forum. Power, Privilege, and Rank.

MODULE 6. MAKING ALLIANCES ACROSS ISSUES AND STRUGGLES: WORKING WITH POWER AND INEQUALITY BETWEEN OUR MOVEMENTS

Introduction

It isn't easy to build social power from below that is capable of facing down authoritarian governments and far right movements, one that can take on the forces of climate destruction, violence targeting migrants, LGBTQ+ people, racialised minorities, women or disabled people. It is sometimes hard to imagine beating corporate power or overcoming neoliberal structures. If our movements and communities are not able to do this at the moment, we need broader and deeper alliances – with other movements and other communities in struggle. This is far easier said than done: differences of power and social inequality as well as different ways of organising and talking represent real reasons why we aren't doing this already (or are trying and failing). This module explores some of the challenges as a first step in the right direction.

Learning aims

- Understand that social inequality and power differentials between movements and communities in struggle work differently to the often interpersonal and small-group challenges of power and inequality within movement groups and organisations
- Understand that different communities in struggle and different movements organise and talk in different ways, which take time to understand and learn to bridge
- Recognise both the challenge and the necessity of developing effective alliance-building across apparently different movements and communities in struggle
- Move towards the capacity to talk and collaborate as autonomous peers with people in very different movement and social situations in complex movement alliances

The model of activism discussed in Module 5 fits within a broader understanding of movement struggles for a better world. This says that movements *move* – they grow and develop (or are fragmented and decline) as we make activist alliances, join the dots between issues and bridge communities – creating what the Zapatistas call "a world where many worlds fit".

Any "movement", any "community", is already a huge achievement in bringing together people who are often very well aware of the differences between them as well as their similarities. As we saw at the start of this chapter, there is an "ecology of social movements" – different individuals, networks, informal groups, and formal organisations come to exist in a shared space, often with competition and conflict as well as solidarity and understanding. In fact, there is often an ongoing argument about where the boundaries of the "movement" are: is it "the anti-authoritarian climate justice movement" or "the environmental movement" or "the movement against this LNG terminal"? The same is true for communities – it is only through a lot of work (sometimes in past generations) that people come to think of themselves as a community, and there is often a lot of argument about what the community really is and where its boundaries are.

Typically, movement activism starts from a particular place. That could be from quite privileged people who see a "general issue" from the media or another source, or it could be people who are struggling to survive and are affected by something that seems more immediate – but these are both specific places in society. To build effective movements or communities, both will need to reach out beyond the people who immediately and automatically agree with them: this is the ABC of activism. So we go from organising around a particular demand, using a particular tactic, campaigning on a specific issue, or working within a particular social network – and try to expand that. We try to organise actions, events, demos, discussions etc. that bring people together around a wider sense of who we are, what the problem is, what needs to change. And if we succeed in doing this, conversations and collaborations emerge that shape a wider sense of "the community" or "the movement".

But then we also try to reach even beyond this. We try to build links between issues (the climate and social justice; Palestine and labour struggles; feminism and racial justice). We try to create solidarity between movements and communities (migrant activists and local working-class community activists; radicals and LGBTQ+ communities under threat; anti-fascist activists and racialised communities). Sometimes this is easy if everyone already agrees and if we don't ask very much of each other. Sometimes it is very hard and we struggle to even understand each other's ways of doing things.

However, the "easy alliances" are also the ones that mark out how strong we already are – and our limitations. The "difficult alliances", if we can develop them, offer the possibility of growing our strength, finding and giving solidarity, and becoming able to face down the opponents we aren't currently able to win against. If we think that we aren't winning, spending time on these "difficult alliances" is where we can start to change that.

That doesn't mean that every new alliance is a good one: this is why we need to learn how to work with power and inequality that can exist between communities in struggle and between movements, in all sorts of complicated ways. Becoming able to recognise and navigate these challenges is a key part of being able to make "difficult alliances" that go deep, the ones that bring solidarity, a willingness to take risks together, genuine learning on all sides, and something that starts to look like another world struggling to be born.

This can demand a shift of gear from us – to something more than a personal level. We may be well used to working together in small-group contexts, within organisations or movements where we experience a basic sense of similarity with other participants. We are almost certainly also well used to conflict with opponents who are more powerful, wealthier and more culturally dominant (whether in conflict with the state, corporations and powerful social groups or in our own workplaces, families and neighbourhoods). But finding a way of speaking and acting out of our own collective strength in making alliances and building solidarity with our peers can sometimes be quite an unfamiliar way of being – even if it is the kind of world we want.

So far in this part we've mostly worked outwards from where each of us is situated: seeing our organisation within our wider movement, looking at our movement across time, thinking about power and inequality within our organisation and movement. We've tried to keep the wider picture in mind – the broader ecology of social movements, alliances between movements, power and inequality between different movements – but still mostly starting from our own experience and activist situation.

But if we want to be able to make real alliances which are genuinely transversal, we need to be able to start seeing other movements on their own terms, not starting from what we might hope to do together, and imagining how they might see us. Another way into this is to try and decentre ourselves by starting from the wider landscape of social movements and working inwards. All of this gets us more into the nitty-gritty details of how we work with other people we don't know, who work in different ways to us, and think about movements in their own particular ways.

Coming back to the metaphor of an *ecology* of social movements: our movements, our organisations, and our networks can be thought of as existing in a social movement landscape. That landscape includes both the places we go all the time (close allies, communication spaces, familiar activist routines) and places which are unfamiliar or even scary (kinds of organisation, movement or community that we are loosely aware of but don't know how to work with; kinds of communication we can barely handle or not at all; ways of doing things that we're just not equipped to deal with – yet). At whatever scale (local, regional, national, transnational) there are long-standing relationships, interactions, ways of thinking etc. as well as areas of mutual ignorance, suspicion, hostility etc. Building more powerful alliances usually means going "beyond the fields we know", as wisely and strategically as we can.

A few things to think about

- **Different movement issues and languages.** Often we identify "our movement" in terms of a particular phrase which may be quite recent (e.g. "climate justice") or campaigning around a particular issue more generally (e.g. anti-war activism). That tells us what really matters to us and can be a basis for discussions. But how do we start a conversation with someone who defines themselves in a different language, or around a different issue altogether? What is our basis for the conversation – a common enemy, an immediate crisis, a deeper set of ideas, some wider shared interests, something else?

- **Different political cultures.** Different movements and organisations are more or less focussed on ideas (and use very different languages to talk about them - sciencey, feminist, Marxist, identity, power...) and talk about different kinds of material interests (when they do). They happen in different parts of people's lives – as a full-time voluntary activity, as a paid job, as something they do in their leisure time (outside paid work and caring labour), as something that happens in the workplace (unions) or where you live (community activism), etc. They focus on different things - getting media attention, winning concrete gains or preventing specific losses, how other activists see them, etc. How do we work across these differences?

- **Not everyone thinks of themselves in movement/activist terms.** In some parts of society people who are very busy organising may think of themselves more as part of a community (maybe based on geography, ethnicity, social class, LGBTQIA+ identity or something else again). Those communities have a life of their own which is often lived in struggle on a day-to-day basis whether or not anything more visible is happening. How do we connect with "a community" if we are organised as "a movement", or vice versa?

Learning activities

The main thrust of this module is to think concretely about the practical challenges that come from seeing ourselves more clearly in relationship to other kinds of movement or communities in struggle. There are two suggested activities, which can be done with others from the same group or individually. One focuses on trying to map out the "social movement landscape" that our own organisation exists within. The other one looks at what is practically difficult when trying to work together across difference.

Seeing ourselves in the social movement landscape

This activity encourages activists to assess their position within the social movement landscape, focusing on identifying key movements and communities in struggle. Through a four-stage process, participants analyse their surroundings, considering geographical scope, ideological orientation, and relational dynamics. By mapping these elements, they visualise alliances and gaps, prompting reflection on collaboration, intersectionality, and organisational identity. The activity emphasises understanding how others perceive their movement, highlighting strengths, weaknesses, and potential for collaboration. It fosters introspection and strategizing to facilitate effective solidarity within the broader activist ecosystem.

The practical challenges of working across difference

This activity explores challenges of collaboration across diverse movements. Participants identify practical obstacles such as linguistic barriers, conflicting audiences, and resource competition. They assess familiarity with other movements, seeking ways to enhance mutual understanding. The activity also probes existing initiatives facilitating cross-movement solidarity, encouraging collective exploration and potential joint efforts.

Learning Resources

- McAlevey, J. (2019). How to Organize Your Friends and Family on Thanksgiving. Jacobin.
- Mohandesi, S.; Risager, B.; and Cox, L. Eds. (2018). Voices of 1968. Pluto Press, 2018. Extract on "Czechoslovak radicals visit west German radicals in 1968".
- Tattersall. A. (2006). When Planning a Coalition, think of a RAINBOW. Common Library.

To learn more about the Movement Learning Catalyst learning resources, visit www.movementlearning.org

Transnational and Translocal Organising

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Credits

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PART 2
TRANSNATIONAL AND TRANSLOCAL ORGANISING

INTRODUCTION

Solidarity across territorial borders is amongst the most important and proudest heritages of social movements, from worker internationalism to the Zapatistas. Yet never in history have more border walls and barriers been built, with all the violence they imply. Sometimes we can feel like the nationalists and capitalists are better at collaborating globally in promoting their world of exclusions, extraction and inequality, than we are managing to organise for a better world.

What do we need to rethink in order to organise across and beyond these borders? What can we learn from previous experiences of working across borders and building solidarity? How can we fight the globally interlocked systems of oppression and injustice if we don't address transnationality in our political work?

This part focuses on transnational and translocal organising tackling the spatial and geographic dimensions of organising complementary to the transversal dimension covered in Part 1. It aims to redefine transnational and translocal organising, offering pathways for envisioning a world beyond borders and fostering trust, alliances, and solidarity across diverse geographical contexts. It confronts the grim realities of transnational flows of power and systemic oppression on a planetary scale, and suggests that European movements should acknowledge their societal impacts beyond their borders and recognise the interconnected nature of local struggles. Central to this discussion is the exploration of transnationalism, not as an abstract concept but as a grounded, translocal practice facilitating coordination among and across localities. Drawing on movement history and past experience, it shows examples of transnationalism as a practice of collective liberation.

Learning aims

- Develop an understanding of concepts of transnationalism and translocalism, including their implications on activism and organising efforts
- Analyse the interconnectedness between transnational flows of power and local forms of organisation
- Critically evaluate power dynamics within transnational contexts, including assessing one's own power abilities and their roles in transnational practices
- Examine historical case studies and various models of transnational and translocal organising to understand their impact on current dynamics
- Explore the role of radical imagination in transnational movements by practising visioning to empower movements and in transcending limitations of nation-states and envision alternative futures

This part is best understood as in dialogue with, or complementary to, the other parts of this curriculum, as it offers a perspective and entry point to the geographical dimension of working across differences. It comprises four modules, each offering learning activities, case studies, and resources. These modules collectively explore the conceptual underpinnings of transnationalism, delve into historical movements, and emphasise the importance of radical imagination in transnational organising. Key areas addressed include conceptualization of transnationalism, positioning oneself as an agent of change, understanding historical and contemporary transnational realities, nurturing imagination, and developing practical skills for collective action.

Considerations for educators

Educators who use curriculum in this part should be aware of the challenges learners approaching this content could face and plan how to address them. In particular, learners would face three key challenges: The first is that talking about transnationalism is deeply connected with violence and oppression and understanding how to work against these massive systems of oppression in our thinking and praxis can be painful and challenging. The second is the conceptual challenge to view transnationalism as a process that is neither good or bad, and which can be instrumentalised in different ways, thereby allowing – or burdening – the learner with agency. The third is generating the ability to actually think beyond the nation-state and therefore beyond socialised terms and ways of seeing this world.

MODULE 1. UNDERSTANDING TRANSNATIONALISM AND TRANSLOCALISM

Introduction

Working with difference is a recurring topic across this curriculum. We believe that making space for engaging specifically with the transnational is important because, as organisations and movements, we in some way or other confront the state and its bordering practices as means of control (no matter how much we question or envision a non-state, no border reality). Not only at times when we are tied to legal, economic and political frameworks and restrictions generated by the boundaries of the nation state, but also across state entities. As we confront the state, we confront power and domination. We see transnationalism as engaging with a specific kind of difference that is politically reproduced and schematised through practises of bordering that create and maintain division between peoples, producing powerful centres, and subjugated peripheries.

We might be tempted to say that our theory and actions are only confined within the framework of a particular nation-state. But even if that is the case, we must ask ourselves how our condition is intertwined with global supply chains, financial flows and supra-national governance structures. And, of course, we have not even begun to talk about how historical and global structures of oppression like colonialism and white supremacy have influenced our ways of thinking, being, and imagining (b)orders.

Even when a national consciousness has served as a pre-condition for liberation from colonial structures, theorists of those movements have warned against stopping there. In his highly influential work, *Wretched of the Earth*, the pan-Africanist Franz Fanon contemplated the trajectory of decolonial struggle and the role of nationalism: "Nationalism is not a political doctrine, nor a programme. If you really wish your country to avoid regression, or at best halts and uncertainties, a rapid step must be taken from national consciousness to political and social consciousness" (Fanon, 2007).

So, is transnationalism a means or an end? Does the "national" drop out of trans-national at some point, when we move to a new form of political organisation? Or will there always be "nations"? Is transnational activism the road we must take towards some other "political and social consciousness" that Fanon spoke of, or is it the destination itself? We simply do not know the answers to these questions, and there is no way to predict the course of history. What we do propose is to start where we are now: a world where it is all too easy to assume our agency is tied to the borders of nation states, while the challenges we face (i.e. migration, neoliberal globalisation, capitalism, climate crisis) are not.

Let's adopt as a working definition of a *transnational activism* the following, by Sanjeev Khagram and Sarah Alvord (Khagram & Alvord, 2006).

> "Transnational activism creates "dynamics that cross, alter, transcend or even transform borders and boundaries." (Khagram & Alvord, 2006).

Clearly, such dynamics can be highly damaging (think of a country invading another, a corporation playing countries off against each other to lower taxation rates...), or could be beneficial if they are about bringing people together, expanding equality, bringing justice (think of peace processes, of free movement between countries, of the sharing of common resources like water.) So clearly whether transnational activism is a good thing or not depends on who is doing it, with what interests and effects. But it is something that is happening in the world we live in, with greater and greater intensity.

We can usefully start to open up these categories by recognising that there is something like "top down transnationalism", which is deliberately pursued by corporations and powerful states to advance the interests of capital, reduce rights, evade taxation, ensure uneven and unfair development among other things. This is sometimes called "globalization". And there is a "bottom up transnationalism" which has more in common with a heritage of workers internationalism and with the solidarity and coordination of resistance and liberation movements.

In navigating this mined terrain, let's be conscious of the oppressions experienced over history, and until this very day, when we talk about, experience, or fight against borders of any kind. For this entire chapter we need to pave ways of stepping out of our everyday presuppositions about what and where politics is, which are partly created by our inherited vocabularies and imaginaries of empires, of states, of nations, of colonies. We need a way to step back from several centuries of political thought in the West which has been dominated by "national" and "state" figures, to become attentive to the ways transnational acts are already transforming this geography, and allow a space for alternatives to emerge. Providing ways of doing this will be the main task of this introductory module.

Learning aims

- Acquire an understanding of the concepts of translocalism and transnationalism
- Understand "bottom-up transnationalism" and "top-down transnationalism"
- Acquire an introductory ability to step out of the nation state of mind and to imagine beyond the nation state

This module explores transnationalism and translocalism, offering multiple perspectives, including critical and decolonizing approaches. It discusses the importance of conceptualising transnationalism not as confined within national borders but as an active engagement with global differences and bordering practices, aiming to build solidarity and challenge power dynamics and divisions created by state borders. It offers a range of perspectives on transnationalism and how memory, language, and political interventions have shaped it.

Considerations for educators

This module is consciously adopting a multi-perspective approach. While this might be confusing for some learners, with this we want to stress the necessity of pluriversal perspective on transnationalism. Therewith, this module tries to build a critical trainer's mind and attempts to encourage the learner and trainer to build their own multifaceted version of what transnationalism (and translocalism) is. Dealing with nations, nationalism, and borders can trigger participants with and without lived experiences of bordering, border-crossing and violence. Be aware how you frame certain parts of the training and hold the space carefully.

Understanding transnationalism

Transnationalism is neither good or bad in and of itself. It can be either emancipatory or oppressive depending on who is defining its terms. We think about the differentiation between "top down transnationalism" and "bottom up transnationalism". For example, big business uses transnational practice to evade regulations, collective bargaining, and taxation (top down transnationalism). On the other hand, there are examples of workers organising transnationally and translocally to ensure that businesses can't escape paying a fair wage by moving to another country (bottom up transnationalism).

Colonialism itself could be understood as a (very violent and extractive) form of a transnational organising that exists to this very day. It is a set of political, economic, and cultural frames which have been – and continue to be – used to organise society at a global level. It both created nation-states in places where such forms of social organisation were not the norm, and it has organised those nation-states into a system that transcends the borders of any one of them. To be clear, as a form of coordination between and across localities, colonialism is a top down form of transnationalism, akin to imperialism. It is grounded in centuries of violence, and it has globalised mechanisms of commodification and expropriation. It uses border regimes to allow the free-flow of capital (and, selectively, the flow of labour when it suits capital), and it enforces cultural norms that privilege the few over the many. It is important to keep this form of oppressive top-down transnationalism in mind, when thinking and enacting alternatives to it.

Understanding translocalism

Given how dominant this colonial form of transnational social organisation is, it can feel daunting to imagine an alternative. However, a useful way to create some breathing space for our movements, and to immediately move beyond the imposed borders in our heads, is to imagine the concept of **translocalism**. It allows us to think not in terms of national flags and state border-crossings, but in terms of locality. We are always in one place or another, and those places are local, and they are connected. Translocalism encourages us to imagine "the local" as a space that is not closed, or "given," but as an open-ended process (Massey, 1991). Over recent decades, the degree and ways in which local spaces are inter-connected through the movements of people, through economic, technological, environmental, and cultural phenomena has increased and intensified dramatically. Let's adopt the working definition of Subhabrate Bobby Banerjee, who suggests that:

> "Translocalism refers to relationships across locales designed to create new spaces of agency and overcome the constraints by a nation-state bounded view...They both transgress and transcend the locality and have the ability to change the local spaces from which they emerge (Banerjee, 2011)."

Agency and change are two of the key elements of this definition. These concepts speak to the ability of translocalism to rechannel power to where we are at: real places where we can begin to organise. Translocalism is not only about starting with the relationships we have but also recognizing different realities can exist at the same time. This recalls the famous Zapatista saying, "Un mundo donde quepan muchos mundos" (a world where many worlds fit). Translocal activism is about linking localities on a global web of possibilities – not only as a part of a utopian vision, but as an ecology in which, like mycelium, coexistence is a precondition for survival.

Questions to dive deeper into translocalism

These are the kinds of questions that could be useful to reopen our imaginations about where we are and who we are connected to:

- Where are you today, reading this paragraph, where are you local and (how) has your locality changed in the past year(s)?
- What has led you to reading these questions, who are the people that told you about this trainer's guide and where are they now?
- Is there anywhere you feel local and (where) do you draw boundaries around locality?
- Is there anyone who contests the directions and boundaries of that locality?
- Where does the translocal begin for you?

Stepping out of the nation-state frame of mind

Figure 2. 1. Un mundo donde quepan muchos mundos – a world where many worlds fit, 2012 (Source: Patri)

If we recognise that our localities are interconnected, and that this means our lives and futures are intertwined across borders, how can we go further in stepping out of the nation-state imaginary that hides these interdependencies? We propose three ways: an approach to memory, to language, and to political invention.

Memory

If we think about what it "means" to be a certain nationality… Italian, British, Congolese or Chinese… often what we have been socialised to think of is a particular reading of history and a particular set of symbols that give an image of what being part of that national group signifies. One of the most powerful of these kinds of symbols is military sacrifice: monuments and tombs of soldiers are often at the centre of national days and national ceremonies. To open up the possibilities for critically thinking about the meanings of nationality, it can be useful to imagine alternatives. Here is a poem which does just that:

At the Un-National Monument along the Canadian Border

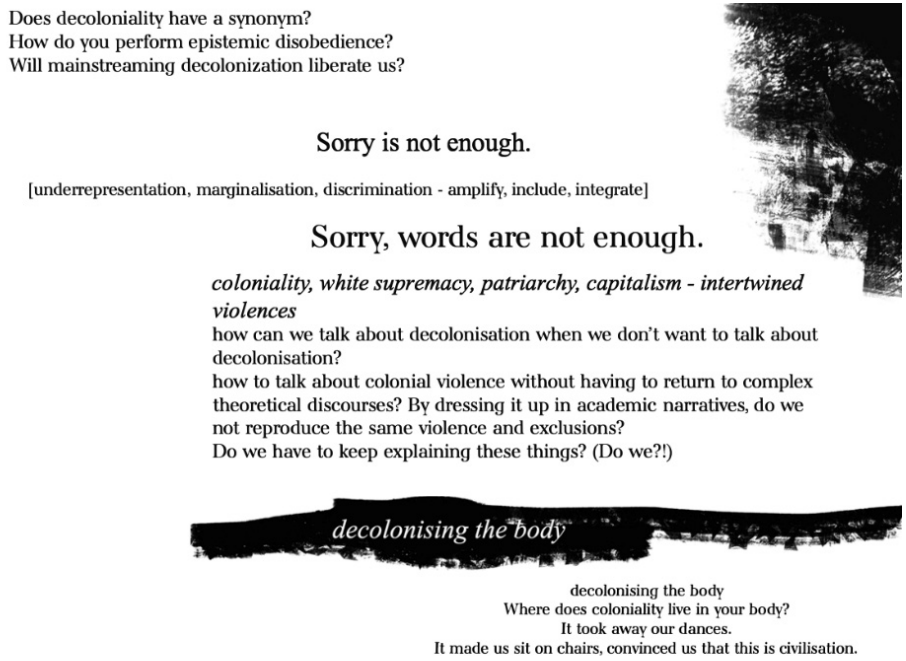
(William Edgar Stafford, 1998)

"This is the field where the battle did not happen,
where the unknown soldier did not die.
This is the field where grass joined hands,
where no monument stands,
and the only heroic thing is the sky.

Birds fly here without any sound,
unfolding their wings across the open.
No people killed—or were killed—on this ground
hallowed by neglect and an air so tame
that people celebrate it by forgetting its name.

Decolonising our language

As we have noted, the language of the nation-state and empire is deeply encoded into the political vocabulary developed in Europe since the 17th century, and this vocabulary is still the dominant one in which politics is discussed and thought about throughout the world. Getting out of this language which has justified so much violence and disregarded towards so many other traditions and ways of thinking is a massive task. But we can at least come to appreciate how important it is and the many dimensions this struggle takes, including overcoming the very strong Western division between mind and body, between reason and emotion.


Does decoloniality have a synonym?
How do you perform epistemic disobedience?
Will mainstreaming decolonization liberate us?

Sorry is not enough.

[underrepresentation, marginalisation, discrimination - amplify, include, integrate]

Sorry, words are not enough.

coloniality, white supremacy, patriarchy, capitalism - intertwined violences
how can we talk about decolonisation when we don't want to talk about decolonisation?
how to talk about colonial violence without having to return to complex theoretical discourses? By dressing it up in academic narratives, do we not reproduce the same violence and exclusions?
Do we have to keep explaining these things? (Do we?!)

decolonising the body

decolonising the body
Where does coloniality live in your body?
It took away our dances.
It made us sit on chairs, convinced us that this is civilisation.

Figure 2. 2. Alliance for Black Justice in Poland: Agnieszka Bulacik, Marta Jalowska, Katarzyna Kubina Àgnieszka Rözyriskawitha, Oliwia Oladigbolu.. Decolonial Europe Day Booklet.

Epistemic disobedience, as well as talking directly about ongoing violence and exclusions, is a way of performing resistance in language and thought. Epistemic disobedience can include many things but is first and foremost a push against the workings of coloniality. We see epistemic disobedience as a way of bottom-up transnationalism and a system to challenge dominant forms of thinking and sensemaking.

A political intervention

Can the language of internationalism, the processes of transnationalization, be reclaimed from the powerful and rearmed to be used by the subaltern? One of the most influential attempts to do this is by the Zapatista movement. We propose here a political intervention as a bottom-up approach to transnationalism that seeks to build an alternative in response to an oppressive system. The excerpt is from *The Fourth World War Has Begun*, written in 2002 by Subcomandante Insurgente Marcos, as a prominent anti-capitalist and anti-neoliberal and former spokesperson of the Zapatista Army of National Liberation.

A manifesto

"The apparent infallibility of globalisation comes up hard against the stubborn disobedience of reality. While neoliberalism is pursuing its war, groups of protesters, kernels of rebels, are forming throughout the planet. The empire of financiers with full pockets confronts the rebellion of pockets of resistance. Yes, pockets. Of all sizes, of different colours, of varying shapes. Their sole common point is a desire to resist the "New World Order" and the crime against humanity that is represented by this Fourth World War. Neoliberalism attempts to subjugate millions of beings, and seeks to rid itself of all those who have no place in its new ordering of the world. But these "disposable" people are in revolt: women, children, old people, young people, indigenous peoples, ecological militants, homosexuals, lesbians, HIV activists, workers, and all those who upset the ordered progress of the new world system and who organise and are in struggle. Resistance is being woven by those who are excluded from "modernity (Marcos, 1997)"

What does it mean to step out of the nation-state frame of mind? We herewith proposed three pathways to display how localities are interconnected and how our lives and futures are intertwined across borders. With the ambition to further understand transnationalism and translocalism, this module comes to a close and suggest to further dive into the concepts with the preceding learning activities and resources.

Learning activities

Multitudes of transnationalism – stepping out of the nation state frame of mind

This learning activity provides different pathways that encourage the learner to step out of the nation-state frame of mind and provides different approaches to further explore the concepts of translocalism and transnationalism. It explores the complexities of transnationalism, aiming to broaden understanding through diverse definitions and practical experiences. Participants are invited to engage with different approaches of transnationalism from the bottom up, connecting them to their own struggles and experiences.. The activity deepens knowledge on transnationalism's diverse approaches and its implications for organising across borders.

A Walk on Kilburn High

This learning activity focuses on understanding "translocal" concepts through mapping personal spaces, analysing local and transnational connections, and sharing experiences within a community. It involves drawing maps, reading from Doreen Massey, discussing the intricate connections of local places to global contexts, and sharing observations on the translocal nature of their surroundings, facilitating deeper understanding and connections among participants.

Learning Resources

- Banerjee, S. B. (2011). Voices of the Governed: towards a theory of the translocal Organization, 18(3), 323–344.
- Decolonial Europe Day (2023). *Decolonising Europe* – In conversation with Gurminder K Bhambra.
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MODULE 2. TRANSFORMING TRANSNATIONAL AND TRANSLOCAL FLOWS OF POWER

Introduction

With the sheer level of connectivity in the world, working across differences and geographies might seem unavoidable and obvious, like the daily reality of transnationalism embedded in global supply chains, finance flows and interconnected streams of communication. What does it mean to try to transform these transnational relationships (especially if they are ones of oppression)? What does it mean to organise across borders, and build coalitions and alliances across geographies in our current conditions if that is exactly what financial capitalism and the far right are also aiming to do? What does it mean to build transnational power from the bottom-up?

To answer these questions, we must first have a clear picture of the global system we seek to transform. Where does the power reside and how is it exercised? This module points to pathways by which we can make interventions in the ongoing realities of transnationalism. It shows how power plays out and how it can be reclaimed, which allows us to do more than just firefighting the symptoms of the system. Our movements exist and resist exactly where oppressive systems threaten livelihoods. Knowing how those systems work will enable us to fight them, reform them, and build alternatives outside of them.

This module asks us to look at the complex system of power, to assess and position ourselves in it, where and how our organisations and movements function, and how they can work together in their capacity to challenge the transnational structures that disempower, exploit and endanger us.

Learning aims

- Understand how transnationalism operates globally and how it can be either oppressive or empowering
- Get comfortable with the complexity, ambiguity and dynamic nature of transnationalism
- Comprehend the systems of power approach and how different power abilities can work together to create change
- Be able to identify our own/groups/movements power ability and how it relates to other groups' power functions

Considerations for educators

This module is about systems of power and includes many references on how power is used, abused, and transformed. It is crucial to cover questions of power, but it can also cause tension in the group dynamics or lead to feelings of paralysis and depression facing the oppressive realities of today. This module includes a selection of examples which are probably not representative for groups across the movement. Feel free to include your own examples from respective contexts to make the module more alive and relevant to the situatedness of the group.

Systems of Power

Power exists. We can not wish it away. Michel Foucault pointed to the idea that power is found as part of the interconnectedness that defines any society:

> "Power is not an institution, and not a structure; neither is it a certain strength we are endowed with; it is the name that one attributes to a complex strategic situation in a particular society" (Foucault, 1990).

Global capitalism rests on social hierarchies, division, and exploitation, which are to this day ingrained in our understanding of identities, cultural histories, and institutions. A critical awareness of these systems is important if we seek to work across them or create alternatives. We need to create an awareness of how we have been socialised through history (in the way it is taught in large parts of the West) to believe that borders are the foundation stones of political communities, organised in nation states. This conception leaves out incredibly large parts of this world and groups of people that have and do organise across lines of kinship, community, interest, affiliation or geographic affinity. Creating an awareness of these processes means working with power. Who is empowered and disempowered by respective transnational practices, how is access and opportunity distributed?

Going about this, we propose to think in terms of a "system of power," the flows of power within it, and what power abilities we need to develop within our movement to affect these flows. We seek to understand not only how power works but also how different individuals and groups can use their respective powers to come together and build "transnationalism from the bottom up." Thinking in terms of a system of power allows us to see the interconnectedness and dynamics of power relations across the systems in which we are embedded, similar to the interactions within an ecological system. The approach reveals how power operates, circulates, and manifests across different dimensions of this world – a critical perspective when attempting to win power through the strategies of our social movements!

Transnational and translocal flows of power and how to transform them

Within a system of power, there are certain "flows" that power follows. To understand this concept, we will look at various power flows which exist in our current neo-colonial form of transnational social organisation.

1. Transnational flows of people: the European project, aka Fortress Europe

In the European context, "Fortress Europe" is one very visible example of the violent ways in which the concept of transnationalism has been instrumentalized from the top-down to limit the freedom of movement for some, but not for all. In fact, Fortress Europe demonstrates two different versions of transnationalism, both of which have been mobilised to enforce exclusion and advantages gained over centuries of colonial extraction. The tragedies unfolding in the Mediterranean sea with more than 29.000 people who have drowned since 2014, are only one reminder of how the enforcement of borders kills and separates. These deaths are rooted in historical oppression: "The suffering at Europe's borders highlights the growing fissure between the myth Europeans tell about themselves – envisioning their history and place in the world as a force for good and democratisation – and the dark realities of European border politics, its rootedness in institutional racism, and neocolonialism" (Molkenbur, 2021).

Of course this flow – or lack thereof – of people from outside Europe into Europe exists in a parallel universe to the increased flow of people between the borders *within* Europe. While European states outsource their migration management tactics, and hide behind liberal democratic norms, these border regimes are systems which are more than just the physical border infrastructure (Pallister-Wilkins, 2011). An economic system which benefits from the cheap labour of paperless migrants is part of it, as is a military-industrial complex which benefits from the fortification of the borders themselves, as are the people traffickers who can raise their prices each time the border is reinforced. Nationalist political actors benefit from exploiting the suffering and disruption created by ineffective migration policies, and sensationalist media profit from humanitarian catastrophe. All of this raises the question of what transnationalism really means in a context where policies create different ranks of citizenship, human dignity and border regimes that fortify frontiers of poverty.

Countering this oppressive "transnationalism from above", the worsening situation at the European borders has given rise to many social movements across and beyond Europe fighting against these border regimes. These groups articulate and act upon a solidarity that dares to cross, alter, transcend or even transform the borders and boundaries built by European governments themselves. These "counter flows" include groups that support people on the move directly in crossing borders, as well as aiding with legal, medical or structural support. These movements also include sea rescue groups, mutual aid and support groups that fight the consequences of the border regimes in localities, and present alternatives that challenge Fortress Europe and its violent implications. They include networks of cities and local administrations that provide sanctuary and try to enact an alternative migration policy to their national governments. And importantly, they include movements organised and led by migrant communities who are challenging policies and deeply-seated cultural narratives of who is considered "in" and who is "out." Mapping these windows of opportunity or pathways of intervention allows not only to imagine differently but also provide a starting point to shake this system at its root and transform it. Let's break Fortress Europe with transnationalism from the bottom up!

2. Transnational flows of economic power: capital, debt, financial markets and the invisible hand

It is no news that contemporary global financialised capitalism means that capital is moving freely across borders, while states are territorially and/or geopolitically restricted in governance and often dependent on the interests of private capital. The cycles of enrichment in this economy show yet another layer of the dependencies and interconnectedness of the world we live in (Klein, 2007). This form of transnationalism from the "top-down", one could argue, is rooted in one of the oldest systems of exploitation: debt.

As David Graber points out, debt has had a central place in the history of humanity. He explains how debtors' revolts were frequent in ancient Athens as early as the 6th century B.C., forcing debt cancellations and prohibitions against debt enslavement (Graeber, 2014). The "debt crisis", triggered in 1979 by the Federal Reserve's rise of interest rates on the dollar, and which the World Bank and the International Monetary Fund used to "structurally adjust" national economies, led to increasing debt in entire regions. In reality, in the wake of several decades of de-colonial struggle, this process de facto re-colonized much of the former colonial world (Altvater, 1991).

The transnational political economy systematically channels resource flows from countries in the grip of the debt crisis (largely in Africa and Latin America) towards Europe, the U.S. and more recently China (Federici, 2016). How deeply embedded the logic motivating the debt economy is can be seen in the ways that individual debt has become increasingly ubiquitous even in the economies of the global North (i.e. student loans, mortgages, credit card and micro-finance debt). Paired with a decline in, or end to, the promises of the welfare state, the flows of the transnational debt-system and its repercussions affect people worldwide. The visible decline in social solidarity and increased social cleavages make it clear that alternatives – or counter flows – to the current economic system are still at the very margins.

How to counter these transnational flows of economic power? There are some signs of hope. There are movements reclaiming transnationalism in this area by fighting for debt reduction or cancellation. Debt cancellation is a deeply decolonial demand and has been around for many years with a particularly active period after the financial crisis. Movements here include the Committee for the Abolition of Illegitimate Debt, Egypt's Campaign to Drop Debt or more recently Debt for Climate. Other actors in this area fight for restitution, tax justice, or improving financial literacy. Building up alternatives is another approach for transnationalism from the bottom up and includes fostering approaches of commoning, disrupting global supply chains, or campaigning against the role of financial interest.

3. Transnational flows of information power: more info, more justice?

Theoretically, information, knowledge, skills, and everything out there in the online universe flows across borders and into the hands of the many. Access, however, remains a frontier and a key marker of difference – not only access to electricity or the internet itself, but more broadly access to the sites of information. The borders drawn in the global flows of information take shape much beyond national and regional regulation and censorship, but are in many cases shaped extensively by the ownership structures of private companies, restrictions, and advertising. While you might jump the fences installed by a local authority, other filters and selective algorithms apply on social networking platforms and across sites. They investigate your consumer interest and establish a profile that finds itself siloed and bordered off from the imaginary endless flow of information.

Communicating across places around the world offers great opportunities and might sound like the key to effective transnational communication and cooperation. But is that so? Does the possibility of Zoom, Slack, Discord, Signal, and so many other platforms really enhance transnationalism from the bottom-up? Or do we buy into transnationalism from the top-down, when buying into these platforms and flows of information? Obviously, sustaining transnational communication with other actors working across similar struggles is a great step in understanding more about respective realities and sharing best practices. However, to build a transnationalism from the bottom up, groups work to re-appropriate information flows online and reclaim their ways of communicating. Examples of this transnationalism from the bottom-up can include working with more independent media outlets, enhanced knowledge and skills about secure communication and information flows online. Additionally, resisting the flows of information power requires dynamic awareness about silos of information, as well as hacking and boycotting.

4. Transnational flows of realities: transnationalisms beyond the human world

It should be no surprise that life on earth does not entirely play by human-made rules. The anthropocene is where we find ourselves, but the historically intersecting ecologies of this world are deeply entangled with life on earth today. As Amitav Gosh writes: "Humanity is being so closely entangled with the products of the Earth that the past cannot be remembered without them" (Gosh, 2021). Seeing it from this perspective, the first act of translocalism was certainly not an ocean-crossing or exploration of so-called "unknown territory", but rather the constant ways in which ecosystems flourished and interacted with each other.

Movements across the world continue to connect deeper to indigenous knowledge, decolonial practice, and the non-human world. They are removing themselves from the structures that uphold not only the human/nature binary but which also detach transnationalism from wider networks of ecologies, leading to a human-centred view that foresees no agency in non-human processes. These include indigenous resistance groups, but also groups that ground ecological, and at times spiritual, practice in their work. Trauma-informed body work can also be an approach that establishes us as activists far beyond the simple human lens, but can allow us to engage with intergenerational trauma, connection to the land, and other living beings.

5. Flows of ideology: when the transnational becomes fashionable – but for whom?

There are different ideologies in the world today, they can all be good (or bad) at flowing transnationally. While we might think that a bottom up transnationalism pre-supposes a commitment to global solidarity, what would we call forces on the right connecting across borders? "Are we awaiting a transnational party from the right, realising what the socialist international failed to achieve a hundred years ago" (Guérot, 2017)?"

The French philosopher Etienne Balibar wrote that the national question in Europe has led to a monopoly of representation of the ruling classes, hindering access of others to the European institutions and wider participation in collective meaning making. Instead of rejoicing in the diversity of the European project, Balibar wrote that "Europe has neither conceived nor constructed its own pluralism - this has produced fetishised representations of collective identities, enclosing them in stereotypes of 'invented traditions'" (Balibar, 2017). So, perhaps paradoxically, economic integration has led to an increase in nationalistic feelings and stereotypes, which were all too evident in the way the EU dealt with the financial crisis, for example. The far right has exploited this situation, so that they now position themselves both as the real Europeanists and as the protectors of national identity: as nationalist internationals, who organise under the banner of "a Europe of free and sovereign nations". Ulrike Guérot responds even more provocatively to Balibar and writes that, "the populists are the real Europeans, as they, for the time being, do a better job of organising transnationally than the scattered left or liberal parties on the European continent" (Guérot, 2017).

1. Originally adapted from the works of Marshall Ganz, Harvard University.

Abilities to transform the flows of power

If power is a complex strategic situation in society, as Foucault observed, then we can still think about our agency to affect that situation. The community organiser and sociologist Marshall Ganz reflected on the ways in which power can be harnessed to affect change. In doing so, he differentiates between different kinds of power: power with and power over. Power comes from our ability to come together and build the collective to achieve common goals (power with) and to force employers or the state (or another entity with power for example private business) to do something they would otherwise not do (power over) (Ganz, 2010).1

Taken together, these perspectives open us to the understanding of how power operates and how we can re-channel power flows to make change. In this system of power, there are different ways in which power – we call them "power abilities" – can be depicted. We propose one schema, initially developed by Marshall Ganz, which includes structural, associational, institutional and societal forms of power. The schema was elaborated by labour organiser Daniel Gutiérrez with eight additional abilities.

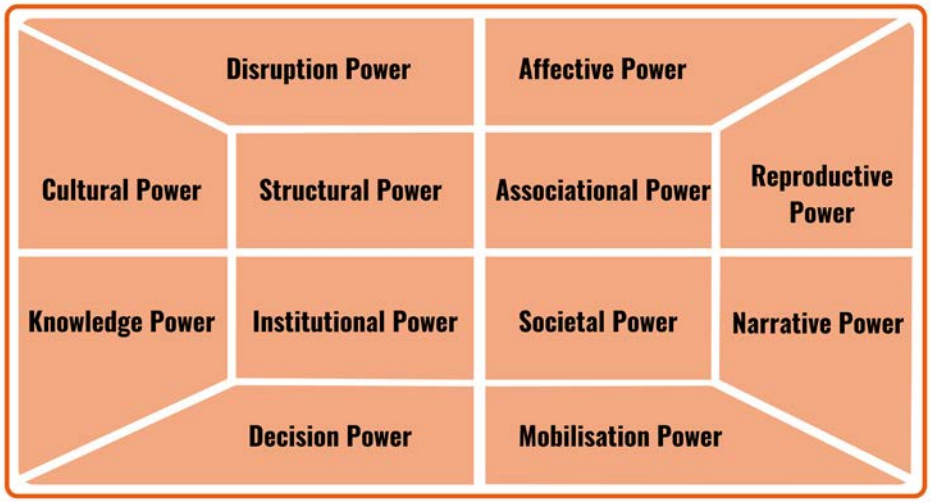

Figure 2. 3. Systems of Power: A Model. Adapted by Daniel Gutiérrez based on Marshall Ganz

Power abilities

Structural Power: Ability to withhold labour (worker centred action) and/or disrupt production (also possible in other ways including direct action etc.).

Associational Power: Ability of workers to organise and act collectively. The power comes from the "subjects" willingness to act in alignment with collective action.

Institutional Power: Ability to use collective action for better contracts or improved regulation or laws.

Societal Power: Ability to win allies for their goals with wider coalitions and actors.

Disruption Power: Ability to withdraw cooperation in ways that create systemic disruption (strikes, blockades, boycotts, or obstruction of processes).

Cultural Power: Ability to influence or shape authority over practices, cultural institutions and representations, by shaping beliefs, values, norms, rituals, and identities.

Reproductive Power: Ability to build (counter) institutional structures that can maintain the collective lives of workers, autonomously from capital.

Narrative Power: Ability to shift, circulate and maintain discursive frames, shape common sense and make meaning.

Mobilising Power: Ability to bring people together to act collectively, in a unified and coordinated manner.

Decision-Making Power: Ability to build by inserting allies or partners in key decision-making roles across workplaces, institutions or governmental bodies.

Knowledge Production Power: Ability to learn, generate, retain, and circulate knowledge of resistance and analytical frameworks to assess it.

Affective Power: Ability to influence others emotions, feelings, moods etc. and thereby shaping their attitudes, behaviours, and perceptions.

When thinking how to shift power from below or through "transnationalism from the bottom-up", the power abilities operate alongside each other, addressing different parts of the system. Various actors – from government institutions, businesses, organisations, movements etc. – move in and around this system of power. We can further dive into how change is generated in the learning activity attached that supports us to assess which abilities your group

has and how they can work together with other actors.

Closing

Assessing our power abilities through the System of Power approach might take us a step closer in understanding our function in the social movement and wider societal context. Once we unite with other actors, with different capacities, we can come together to fight the oppressive flows of power. Building a bottom-up transnationalism requires an in-depth understanding of what we are up against and an ambition to collaborate across struggle and borders in doing so. Only then can we transform existing systems of oppression.

Learning activities

Playing with power abilities

This learning activity focuses on understanding and identifying the power abilities of groups and organisations within the context of social movements, coalitions, or workplaces. It encourages reflective assessment of strengths, weaknesses, and critical areas for development to enhance strategic positioning and alliance-building across borders. Participants will engage in interactive exercises to explore different power abilities and ways to enable more effective collaboration and impact.

Can Yasuní be saved - A simulation activity exploring impacts of oil production

This learning activity is a simulation exercise that reproduces a conference held in November 2011, convened by the Ecuadorian government with a view to reaching a decision on whether or not to preserve Yasuní National Park. The learning activity allows participants to take the role of stakeholders and in the negotiations. As a result, participants gain an insight into the economic, ecological and social impacts of oil consumption, and explore the dependencies within the system. The search for solutions highlights the inequality of the options available to the different stakeholders involved in global power relations.

Learning resources

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- Arendt, H. (1943). We refugees, essay in *Menorah.*
- Debt for Climate! (2023). *Feminist Movements in the Fight against Financial Colonialism in the Face of the Climate Crisis.*
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MODULE 3. LEARNING FROM HISTORIES OF TRANSNATIONAL AND TRANSLOCAL ACTIVISM AND ORGANISING

Introduction

What is the magic recipe for successful transnational work? Or is it just too hard, and the road too littered with mistakes, that we should give up on trying to work at the transnational level? Should we retreat into "the local" because, at the end of the day, it is local groups, organisations, and movements that have a direct impact? How can political work be locally rooted and transnationally coordinated, transcend national borders, and foster solidarity across struggles? What can we learn from previous experiences of working across borders and fighting against bordering?

This module gives a brief overview of examples of historical transnational activism and organising and places them into a taxonomy of transnational organising. The taxonomy supports us to understand where we can learn and still grow in our approaches to transnationalism. Studying historic movements and their transnationality allows us to point more precisely at how they built agency and power. We can also look at them structurally; how were they territorially rooted? How did they exist vis a vis a particular time and space?

Learning aims

- Gain insights from historical case studies of transnational and translocal organising
- Understand the taxonomy of transnational organising
- Develop the ability to place one's group, campaign or movement within the taxonomy of transnational organising
- Develop the ability to reflect on impacts of historical movements on current dynamics
- Engage with the transnational history of one's own group
- Recognize patterns and learnings in social movement history.

Considerations for educators

This module seeks to conceptualise different approaches to transnational activism by arranging them into a taxonomy. Knowing that there will most certainly always be cases, groups, or scenarios that only fit in between these categories, we would like to raise the trainer's attention to the limitations of a taxonomy, but also share that we see it as a tool to break down the complexity of transnationalism. By highlighting differences we do not seek to pigeon-hole any one movement, but rather approach it as a pedagogical method to support learners in developing their own critical analysis of the types and variations of transnational activism and organising.

Transnational movements

Transnational movements have existed for a long time, from anti-colonial and anti-racist struggles, to feminist internationalism, to the labour and the peace movements (Berger & Scalmer, 2017; Gago, 2020). If we want to go all the way back before the existence of the nation-state, we can think about early pre-capitalist versions of cross-border movements, which include peasant revolts, foot riots, and rebellions for greater social political rights (Mollat & Wolff, 2022). Anti-aristocratic social movements were already prominent in the late 18th and 19th centuries in Europe and anti-colonial and anti-imperial movements from the early 20th century. The anti-slavery movements started in the late 18th century, although the earliest documentation still remains limited (Berger, 2022).

To differing degrees, movements have influenced each other and cooperated across borders and boundaries (set by the hegemonic norms of their era) for a very long time. Movements overlapped, and activists in one movement often became active on behalf of other movements. That is why it continues to be important to study them in terms of their interdependence and intersectionality as well as from a perspective that might help us imagine the outlines of something that could transcend the nation state (even if we can't fully picture it yet).

In the late 20th and now 21st century, grassroots actors have transformed through the use of digital networks, connecting struggles across the globe – from the Zapatistas "first informal guerilla movement" in Mexico, to the World and European Social Forums in the early 2000s, to the transnational uprisings of the Arab Spring and the "movements of the squares" in the 2010s (Castells, 2022; della Porta, 2006, Flesher Fominaya, 2014). In the last decades, movements have organised transnationally ranging from the labour movement and social reform movements, to religious movements, to moral movements, to youth movements and peace movements. There have been pan-movements, national liberation movements, women's movements, LGBTQIA+ movements, movements for abolition and racial equality, indigenous rights movements and environmental movements. Of course, we don't ignore the fact that there have also been fascist and nationalist movements that have coordinated transnationally, though for this module we won't focus on those.

How do we understand these transnational movements?

We understand transnational movements as incredibly complex and overlapped phenomena, defined by a wide variety of strategies, tactics and organisational forms. An action could obviously lead to a campaign, an alliance to a gathering. So it may seem odd for us to try and collapse that diverse ecosystem into something as two dimensional as a taxonomy. However, in this curriculum we are engaged in an effort to strengthen our analysis and capacity for critical thought about our past activist and organising work, as well as to develop new ideas and capacities for our future work. Therefore, we see a usefulness – as imperfect as the process may be – in highlighting the characteristics that may distinguish one form of transnational activism from another.

We have no ambition to offer completeness here. However, we believe that viewing these different modes of transnational activism and organising can widen our perspective to what is possible. We propose a taxonomy that is built around six different modes of transnational and translocal activism and organising:

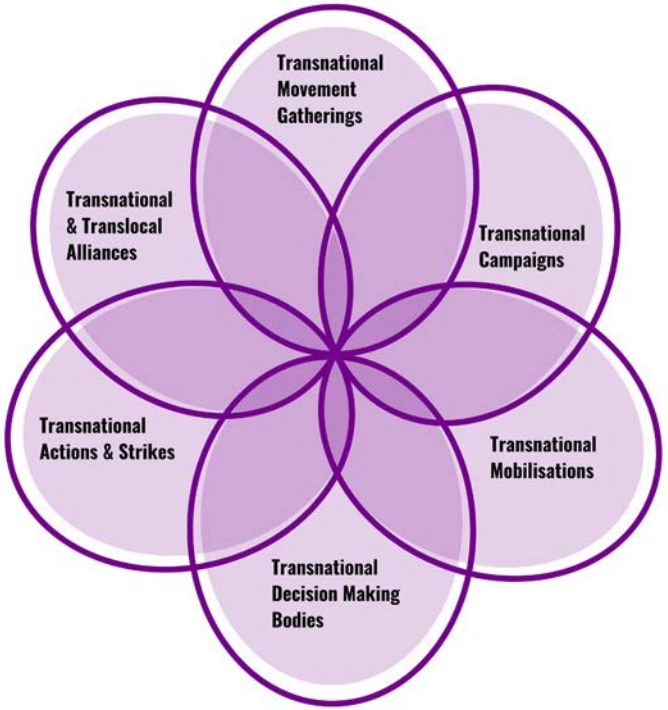

Figure 2. 4. Taxonomy of transnational and translocal activism and organising

1. Transnational and translocal alliances

Some characteristics

- Tend to be a longer-term organising structure
- Build around a similar cause and connecting struggles across geographies
- Can be simply coalitional in nature (built around a shared goal or tactic) or be deeper alliances (built around shared ideological or political commitments)

Barcelona en Comu and the Fearless Cities Network

Barcelona en Comu began as a hyper-local experiment in grassroots political campaigning in the wake of the Movement of the Squares. Their surprise victory just a handful of months later thrust them into the international spotlight, and also created opportunities for Barcelona en Comu to play a key convening role of the burgeoning "municipalist movement." The municipalists imagined an interconnected web of city-based movements each building local power at home, while sharing tactics and inspiration across urban areas. In 2017, when Barcelona en Comu hosted muncipalists from around the world at the Fearless Cities conference, they aimed at something more than just sharing best practices: they sought to advance a theory of change built around the "feminisation of politics" and the idea that cities – the growing and powerful engines of the global economy – could be harnessed through coordinated, translocal activism into a force capable of combating authoritarian regimes, inequality, and climate catastrophe.

Figure 2. 5. La Via Campesina gathering in Cancun, Mexico, 2010 (Source: Amigos da Terra Brasil, CC BY 2.0)

La Via Campesina

La Via Campesina is an international movement advocating for the interests and rights of small scale farmers, peasants, landless workers and rural communities. Originating to resist the impacts of globalisation and officially founded in 1993, the organisation soon developed into a transnational alliance with member organisations across 80 countries and local entities which run actions and campaigns on a translocal and transnational level. The alliance understands itself as autonomous, pluralist, and multicultural, as well as independent from any political, economic, or other type of affiliation. The alliance strongly opposes global corporate agriculture and transnational companies that are destroying people and nature. With their approach they are a powerful example of transnationalism from the bottom up.

2. Transnational campaigns

Some characteristics

- Typically time-delimited activities that elevate an issue and/or put pressure on a "target"
- Usually marked by the ability to say "we won" or "we lost"
- Often connected to the coalitional form of organising (i.e. short to medium-term cooperations between organisations which may or may not share a deeper level of ideological or tactical alignment)

Figure 2. 6. Anti-Apartheid Protests in the 1980s (Source: Paul Weinberg, CC BY-SA 3.0)

International movement against Apartheid

The anti-Apartheid campaign had deep roots within South Africa, but it was also a prominent example of a transnational campaign, especially in its later years. It is also notable the way in which this transnationalist campaign – often led by South African dissidents living in exile – traced the map of colonial domination in reverse. As part of the campaign to free Nelson Mandela from prison, campaigners in the UK successfully launched efforts to rename streets after him. The result is that there are more streets named after Mandela than in any other country other than South Africa. In 1988, in honour of Mandela's 70th birthday, campaigners organised an international concert at Wembley Stadium which was broadcast on television to 67 countries around the world.

Stop EACOP Campaign

EACOP, or East African Crude Oil Pipeline, is a controversial project designed to transport oil from Uganda to Tanzania, raising concerns about its environmental and social consequences. The "Stop EACOP" campaign is a grassroots movement led by Justice Movement Uganda (JMU) in collaboration with concerned individuals, organisations, and communities across the world. It centres on the urgent need to halt the East African Crude Oil Pipeline (EACOP) project – a major infrastructure undertaking with potentially devastating environmental and social impacts. The campaign is an excellent example of a transnational struggle that not only connects several affected countries, but also one that involves other countries which could put pressure on investors of the project. With Total Energies being one of the main investors, the campaign has travelled across Europe and sparked actions and publicity in their name. Stop EACOP shows how fighting multinationals and fighting for climate justice requires a transnational campaign strategy.

3. Transnational mobilisations

Some characteristics

- Informed by a spontaneous moment – not in the sense that they took no planning, but rather that participation reached a tipping point from "the people we turned out" to "we don't know where they all came from!"
- Often larger scale gatherings of actors around a certain moment in time or cause
- Often held by temporary alliances rather than long term organised structure
- Ambition is to get many people out on the streets, not necessarily to build structure or organisation

Figure 2. 7. Alter-Globalisation Demonstration, Prague, 2000 (Source: Ur, CC BY-SA 3.0)

Alter-globalisation movement

The alter-globalisation movement rose around and before the 1990s as a response to neoliberal globalisation, capitalist internationalisation, and the rising influence of financial institutions. Some of the key protests include 1985 against the G7 summit, 1988 against the meeting of the IMF and the World Bank, the 1994 meeting of Zapatitas in Mexico and a three week transport strike by rail workers in 1995, and the battle of Seattle at the end of 1999, in which actions obstructed the negotiations of the third World Trade Organisations conference. In the early 2000s, protests included marches in 2001 against the EU summit and G8 summit. There were certainly organisations that provided necessary infrastructure for each of these mobilizations to reach the level of scale that they did (and other organisations that grew out of these mobilisations) but the alter-globalisation movement was significantly defined by these large, disrup-

tive street protests. Some portion of the people who participated in these mobilizations travelled internationally from one to the next in a practice referred to critically at the time as "protest hopping".

Arab Spring

Starting with anti-government protests in Tunisia in 2011, the Arab Spring turned into a transnational phenomenon with protests spreading to five other countries in a short amount of time. Several long-standing national leaders were deposed, and the protests continued to spread. Unfortunately, as powerful as these mobilizations were, they did not result in the kind of lasting change that many of the people in the streets were calling for, with more organised social forces – including religious communities and the military – being able to fill the leadership vacuums created by these early mobilizations.

4. Transnational actions and strikes

Some characteristics

- Often characterised by the transnational spread of tactics
- Tend to have a feeling of being spontaneous – not in the sense that they took no planning, but rather that the tactic happens in an unexpected or novel way. This allows the idea of it to "travel"
- Organised transnational actions can enhance the spread of certain tactics across borders, which are then adapted to the local context.

Figure 2. 8. Occupy Wall Street (Source: Boris D. Leak, CC BY-SA 4.0)

Occupy Movement

The Occupy movement started with the unorthodox call to go to the financial district of New York City and to "Occupy Wall Street." This moment had plenty of protest antecedents, including the Arab Spring and the Indignados movement in Spain. Going further back, "sit down strikes" were a tactic employed by the labour movement. So a defining element of this protest movement was the idea itself of "occupying" something. It was both intuitive and easily replicable in numerous settings, allowing the rapid spread of the "Occupy Movement" around the world.

Dockworker action against apartheid

Dockworkers are, by nature, internationally oriented. They load and unload cargo bound for all points of the globe. So it is no surprise that some of the most powerful examples of transnational strike actions have resulted from the coordination between dockworkers of different countries. Going back to the 1950's, dockworkers in Durban, South Africa engaged in industrial action in solidarity with the anti-Apartheid movement. In a country like South Africa, where the development of capitalism was deeply intertwined with systematised anti-Black racism, the fact that Black dockworkers could grind the gears of the economy to a halt to support the anti-Apartheid struggle was deeply threatening to the white power structure of the country. The struggle against South African Apartheid grew to be an increasingly transnational effort, as did the dockworker-led actions. For example, for eleven days in 1984, the dockworkers union on the west coast of the United States refused to unload cargo from South Africa. This action reverberated throughout the US labour movement, which at that time had not yet taken a position opposing Apartheid.

5. Transnational decision making bodies

Some characteristics

- Express the ambition to take collective decisions that would guide the actions of many actors across borders
- Historically associated with international gatherings of political tendencies that aim to establish "a line" and agree upon movement-wide strategic objectives for the coming period
- Objective is to walk away with some level of decision/agreement between actors

International Working Men's Association 1864 and the First International

A very early example of an international decision-making body is the founding of the International Workingmen's Association in 1864, which later came to be known as the "First International". What started off as a meeting of German, Italian, French and English workers, in solidarity with Polish workers rising against Russian imperialism, continued to include delegates from more and more countries. While splits partially occurred between Marxists and Anarchists, these gatherings emphasised developing and deciding upon shared strategy and an ideological "line" that would be shared across movement spaces in multiple countries.

Figure 2. 9. Participants at the World Conference on Indigenous Peoples (Source: Yubi Hoffmann)

Minga Indigena

The minga indigena (other terminology, Abya Yala, is used depending on the context[2]) is a gathering of indigenous groups and people's representatives. The word Minga:n (Quechua) refers to a voluntary agreement between communities to come together to achieve a common purpose, e.g. to build a rope bridge, a road, or a government. In the vast diversity of the indigenous movement, not defined by nation state borders, communities gather to make decisions together that not only affect them but their wider community, ecosystems and the cosmos. In some cases decisions of these group processes have influenced local politics or directly resulted in representation in parliaments (CONAIE in Ecuador). In other cases the decision making structures are consulted to bring demands to the international community (Indigenous Environmental Network or the Indigenous People's caucus UNFCCC).

6. Transnational movement gatherings

Some characteristics

- Often take place adjacent to another politically important event (i.e. a meeting of elite decision makers where street protests are also planned)
- Bring together a range of activists and organisers to strengthen ties within or across movements – to connect, network, learn, and build collectively
- Often lean into "decentralised" organising approaches and do not emphasise making decisions or establishing "a line.

World Social Forum

The first World Social Forum was held in Porto Alegre, Brazil in 2001, adjacent to the World Economic Forum and gathered tens of thousands of activists from around the world. Driven by the motto "another world is possible", the forum succeeded in offering grounds for open debate and coordination between movements, including the alignment on demands and strategies of the global justice movement. While some describe it as a crucial moment for movements to come together, others have criticised its lack of strategy. According to some critics, "a strategy for *seizing* power, for claiming agency, has to be devised" (Marsili & Milanese, 2018).

International anarchist gathering

The first Anarchist International of St. Imier was held in St. Imier, Switzerland in 1872 after a split between Anarchists and Marxists in the First International. The first congress attracted workers from a range of countries and resulted in a resolution and a range of common proclamations. The gathering continued sporadically throughout the years and larger ones were held in 2012 and in 2023, where hundreds of anarchists gathered to attend the proposed 412 workshops, and hundreds of supporting events. The gathering was run by volunteers and self-financed and aspired to not only connect anarchists transnationally to promote collective reflection, the sharing of experiences and building solidarity across struggles and borders.

2. Abya Yala: A term that is designated by Indigenous peoples in Latin America to the land. As part of this resistance movement, there was an agreement to return to calling the region Abya Yala ("living land" or "land that flourishes''), as the Kuna people of "Colombia" and "Panama" called it in their original language. Abya Yala is a confrontation with the epistemology of the North, which, in the invasion of the continent, arbitrarily named them. Abya Yala was previously used and part of Latin American thinking as a form of reaffirmation".

Figure 2. 10. Camping at International anti-authoritarian Meeting, St. Imier, 2023
(Source: Madaiono, CC0 1.0)

Lessons

Lessons learned and how groups identify themselves rely on the eye of the beholder. It is dynamic and dependent on a range of external factors. Drawing lessons from these historical case studies often relies on perspective. While some participants might have experienced a moment in time as incredibly empowering or successful, others might critique the internal organising procedures or have other thoughts about the amount of power that was won or lost. Change is largely contextual and unfortunately successes in one instance cannot just be transferred to another location or struggle. However, there are some broad lessons that we can look at.

Power: In theory, all of these examples emerged in response to an oppressive form of power, and in turn sought to exercise a form of counter-power. In reality, in many of these examples the actors involved have struggled to come to terms with where and how they built power. They have not always managed to articulate to themselves, or to the outside world, what is at stake or who is the target of their campaigning, organising, mobilising etc. While discounting differences and unevenness within these examples, it is a useful practice for our learning to look back at them and ask: how did they win, or seek to win, power? If they did not, why not?

Coordination and trust: These examples all point to the fact that holding different, sometimes loosely organised and agile, and sometimes fragile, parts of a transnational project together requires a strong coordination and trust-building capability. This capability is grounded in relational work but has to go beyond that. Building a translocal alliance or preparing for a transnational action does not always allow the space and time to personally befriend all the actors involved. Coordination, agility and flexibility will enable different individuals and groups to work together, after establishing the necessary trust. In the historical examples it is interesting to understand what groups, alliances, gatherings etc. were prioritised when it comes to coordination and how they (or did not) invest in relational and trust work across those struggles.

Patience and resilience: Many groups, campaigns and actions prepared for long periods of time, built lasting relationships of trust, and rested on strong networks which enabled their endurance and success. While this might seem like a downer – especially during the moments of movement exuberance when everything seems possible – holding on to the long view of winning also allows us to experience other positive spill-over effects and different kinds of transformation that happen alongside our fights.

Diversity of views: It is no news that groups and alliances have split up in a field where everything is dynamic and working with uncertainty and volatility is the norm. It is difficult, but exciting, to build alliances and dare to work with people with conflicting opinions. Ideological splits happen in movements but throughout them we should always ground ourselves in the questions: what are we fighting for together, and how can we collectively win?

Process: Groups in their localities and struggles have different processes, different ways to take decisions, different ways to communicate, raise their hand, sit in the room, organise an all-members meeting. There are different cultures around security and relationships to institutions, authorities, and the public. While for some groups business as usual might look like sitting in a large plenary with over 200 people listening to different speeches, other groups work with caucuses and small groups to determine the larger group decisions. Understanding differences in process and finding compromises is key, and trusting the process is both lovely and requires patience.

Context: This might not be surprising that adjusting the work one does to the respective context is crucial in winning transnationally. When one plans to run a transnational gathering in a certain country, be aware of local traditions of organising, communicating and strategising. What are the local conditions and laws when executing an action that occurs in several countries, how tactics can be adapted to a different political context, or how effective will a narrative be, in a place that has little connection to your target? This lesson requires learning, reflecting, sometimes failing, and learning again. But over time context-aware transnational organising is incredibly rewarding, always dynamic, and provides fresh insights to adapt your strategy to win.

Conclusion

Transnational work can be challenging but is incredibly rewarding and part of a recipe to counter the transnational injustices of our world today. Out of frustration, it can lead people to simply focus on the things they can control, or to even fetishize "the local." However, the examples of various kinds of transnationalism that we have looked at in this module do point to examples of success, as well as moments of creativity and unlocking new power for our movements. Therefore, we must hold on to these histories, extract and teach their lessons, because the people who control forms of oppressive and top-down transnationalism have very little interest in reminding us of our rich history of bottom-up transnationalist practice!

Learning activities

Power mapping for bottom-up organising

This learning activity focuses on power mapping for organising transnational campaigns with a "locally rooted, internationally coordinated" approach. It aims to help participants visualise the connections between local power building and international influence. Participants identify key social forces, visualise local and transnational interconnections, and strategize for large-scale change through bottom-up organising. The process includes brainstorming, power mapping at local and transnational levels, and collaborative strategy development, culminating in a power map to inform future campaign planning.

Case study of a transnational campaign: anti-Islamophobia campaign

This case study shows the beginnings of a transnational campaign against Islamophobia that was launched by Another Europe is Possible, a group founded to campaign against Brexit from a progressive and left-wing perspective. Noting the rampant Islamophobia amongst the supporters and the rhetoric of the "Leave" campaign and the far right in the UK and Europe, AEIP decided to launch a transnational anti-Islamophobia campaign, focusing on the UK, France, and Germany as key sites of state-led and far right Islamophobia.

Circle of trust

This learning activity serves one of the key aspects and learning from history in transnational organising: building trust and relationships. It is based on the Public Narrative approach developed by Marshall Ganz and was developed to bring to life the potential of storytelling in collective work. The exercise allows participants to listen to each other on the basis of the participants' own biographical stories of self, us, and now. The learning activity is great to establish stronger connections among participants and can also be used to deepen group dynamics and strengthen agency.

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MODULE 4. RADICAL IMAGINATION: ENVISIONING FUTURES BEYOND BORDERS

Introduction

As important as it is to dive into the histories of social movements before our time, there is a chance it can also limit our sense of what is possible to construct in the future. This module brings in radical imagination as a key capacity and learning tool to think and organise transnationally. We address the concept of radical imagination more generally in *Part 3. Strategies and Movements, Module 2. Vision and Values*, but here we would like to apply the concept to the specific task of envisioning a reality beyond the nation state.

When thinking about transnationalism as a method or a type of intervention, the radical imagination might be the ingredient that brings these versions of transnational practice to a new and emancipatory perspective. Said another way, the capacity for creative and radical imagination might be one of the key differentiating factors between an emancipatory transnationalism, and a version of transnational activism which reifies nationalisms and hardens the permanence of border regimes in reality, as well as in our collective worldview. This module will briefly dive into how radical imagination can be made useful in transnational organising practice.

Learning aims

- Understand the concept of imaginative identification and immanent imagination
- Gain first practise in a visioning exercise
- Gain first ideas on how to apply radical imagination to one's own practise, organisation or movement
- Identify how radical imagination can support one's movement

In the past many years we have – sadly – accumulated a number of moments of strategic failure, a fact that has led groups into periods of disillusion, fragmentation, and burn-out. This has limited celebration of the wins we have had, and the growing currents of repression have lowered people's ambition for change and transformation. Instead of creating spaces for vision and creativity (which are arguably very hard to create) many groups might have gotten caught up in inward-looking strategy discussions and self-referential patterns of disenchantment.

Political work is shaped by the historical and prevalent social conditions. Even to this day, many people, as well as many activist groups, are influenced by their collective inability to imagine a future in which everyone can truly flourish. What do we need in this time where global interconnectedness is on the rise while at the same time we are experiencing the cross-cutting effects of multiple crises? Imagine! This module invites us into a practice of visioning for transnational organising – a (re-)imagining that can rebuild structures and thought patterns to become more effective, resilient, powerful, and creative.

What is radical imagination?

> "Radical imagination is the ability to imagine the world, life, and social institutions not as they are but as they might otherwise be. It is the courage and intelligence to recognize that the world can and should be changed." (Haiven & Khasnabish, 2014).

To understand what we mean with radical, we like to refer to Angela Davis, who said, "radical simply means grasping things at the root (Davis, 2011)". The word radical, therefore, refers to the rootedness in the struggle, the heightened awareness that our imaginations are deeply linked to power imbalances, such as forms of oppression and exploitation. The word imagination originally was considered as "the zone of passage between reality and reason - the zone where the unreal can become real" (Agamben, 1993). Radical imagination is deeply linked to the capacity to imagine and make common cause with the experiences of other people, therewith the ability to build solidarity across borders and boundaries, real or imagined (Haiven & Khasnabish, 2014)

In other words, we can consider the radical imagination as a cyclical process of dreaming + organising + testing + failing + reflecting + revising + dreaming anew! What or who gets to define whether radical imagination benefits those in power or works for the good of all? We read about the visionaries who imagine creating a future for a time when this planet is no longer habitable. Who does their radical imagination serve? To make a distinction and to address this question, we look at how David Graber understood radical imagination. He distinguishes between *imaginative identification* and *immanent imagination*.

Imaginative identification is the capacity to imagine another's point of view, which is the foundation of all caring and supportive social relations. The ability to put oneself in another's shoes is crucial for a democratic system that rests on compromise and working together towards a common goal.

Immanent imagination is the capacity to imagine, and bring about, new social and political ways of being. This capacity lays out the human ability to be political and therewith to decide collectively what we want to do with our lives.

The combination of these two capacities steers directly toward a radical imagination aimed at collective liberation, solidarity and the good of all.

> "If there is anything essentially human, it's the capacity to imagine things and bring them into being [...] alienation occurs when we lose control over the process" (Graeber, 2015).

Figure 2. 11. David Graeber (left) speaks at Maagdenhuis occupation, University of Amsterdam, 2015. To his left, political theorist Enzo Rossi (Source: Guido van Nispen, CC BY 2.0)

Graeber writes that "creativity and imagination were the fundamental ontological principles" of the left and the idea that peoples should creatively produce the world and remake it as they desire. This stands in opposition to a politics of exclusiveness and alienation from the right. The two capacities of imagination are useful to our transnational organising as they show how radical imagination is an emancipatory and empowering function in our practice.

Radical imagination does not need to manifest only in prefigurative politics

Today, we see many movements that aspire to "walk the talk," or to organise along the lines of how they would like the world to look like, creating alternatives to the processes and systems we live in. Sometimes these efforts are hampered by the reality that movements are also reproducing oppressive behaviours inherited from societies. These do not only include racist, sexist, ableist, and classist behaviour, or the oppression of marginalised identities and groups. Movements can also reflect productivist ways of organising and hierarchical ways of decision making.

While the function to prefigure the world we want to live in is an integral part of the ways that social movements have influenced society, you might also have observed a certain perfectionism around this topic. Radical imagination as a practice allows for collective processes to unfold in our spaces and heads and does not immediately demand an implementation. Instead radical imagination is there to push us to do better, without judging the difficulties of organising in oppressive spaces and societies.

As Adrienne Maree Brown wrote, "what we give attention to grows" (Brown, 2018). This shows that even strengthening our focus and attention on the possibility and necessity to imagine a different future can support growth. Allowing space for radical imagination in organisations and movements can not only enhance the capacity to dream but also strengthen collective power and organising capacity.

Envisioning futures beyond borders

Radical imagination is not just about dreaming of different futures. It's about bringing those possibilities back from the future to work on the present, to inspire action and new forms of solidarity today. In the context of organising transnationally and translocally, this means envisioning futures beyond the borders of the nation-states.

In history, the nation-state has both been imposed on people as a form of colonial expansion and imperial control, and it has also served as the terrain of struggle for liberation movements (i.e. post-colonial nationalist movements). In today's landscape, the nation-state is often wielded as a weapon of the right; it is used to symbolise the need to perpetuate tradition, preserve privileges, and/or promote exclusion. Consequently, the nation-state imposes limits on our collective imagination, constraining what we perceive as possible. As Graeber writes "The ultimate, hidden truth of the world is that it is something that we make, and could just as easily make differently". In other words, the status quo, including borders, are human-made and socially constructed, and therefore then can be transformed.

In this regard, radical imagination is not a fanciful escape from reality but a strategic tool in our repertoire of organising, for transformative praxis, and for resistance and collective power building. It invites us to dream boldly and act decisively, recognizing that the world we inhabit is not fixed, but malleable. It requires us to reimagine systems of governance, economic structures, and social relations that prioritise equity, justice, and inclusivity.

By embracing this radical imagination, we can transcend traditional boundaries, envision and co-create futures that reflect our deepest aspirations and values,

that extend beyond borders and usher in a new era of global solidarity and justice. We can forge connections across geographical, cultural, and ideological divides, fostering a sense of global solidarity. Moreover, radical imagination serves as a catalyst for action, inspiring individuals and communities to challenge existing power dynamics and advocate for meaningful change. Whether through grassroots activism, collective organising, or cultural expression, it empowers marginalised voices and amplifies their demands for justice and liberation. And it gives us a sense of hope. As the Indian author Anurudhati Roys puts it: "Another world is not only possible, she is on her way. On a quiet day, I can hear her breathing" (Roy, 2003).

Figure 2. 12. Transeuropa Festival Convergent Spaces, Madrid, 2017, (Credits: Elisa Sanchez and European Alternatives)

Learning activities

Radical Imagination

This learning activity focuses on radical imagination emphasising the political significance of visionary thinking. It aims to enhance participants' ability to envision alternative futures. Through exercises like raw drawing and ancestor encounters, it encourages stepping beyond conventional thinking patterns. Participants engage in exercises to stimulate creativity, envision alternative futures, and reflect on personal and collective narratives, fostering active listening, and collective visions for transformative political action.

Dream Journey Exercise & Guided Visualisation

This learning activity focuses is a guided visualisation of a transformed future, to foster collective imagination, trust, and vulnerability. Participants envision a world post systemic change, exploring senses and participant experiences and roles within it. The debrief emphasises the importance of radical imagination and envisioning a just, equitable future.

Artistic Imagination

This learning activity integrates diverse artworks to stimulate radical imagination in relation to transnational perspectives. Participants explore art pieces individually, noting initial impressions, then share reflections in pairs. Discussions examine free association, memory, and creativity. The activity encourages innovative thinking and collective engagement, offering a unique approach to radical imagination.

Learning resources

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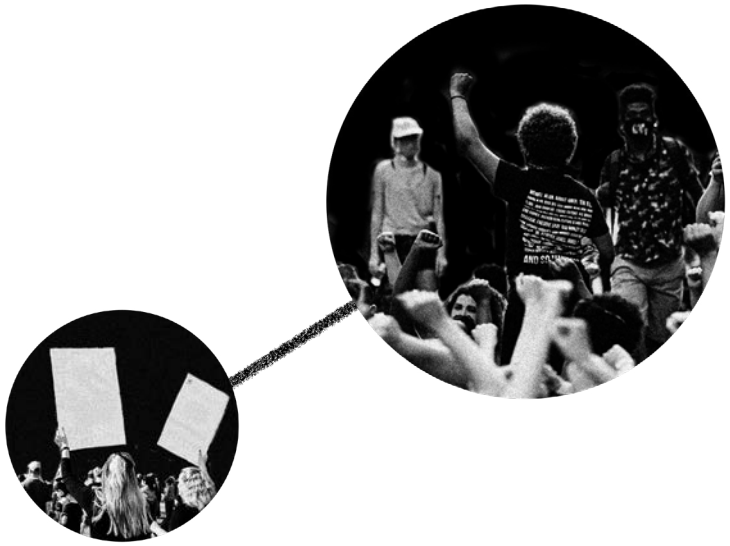

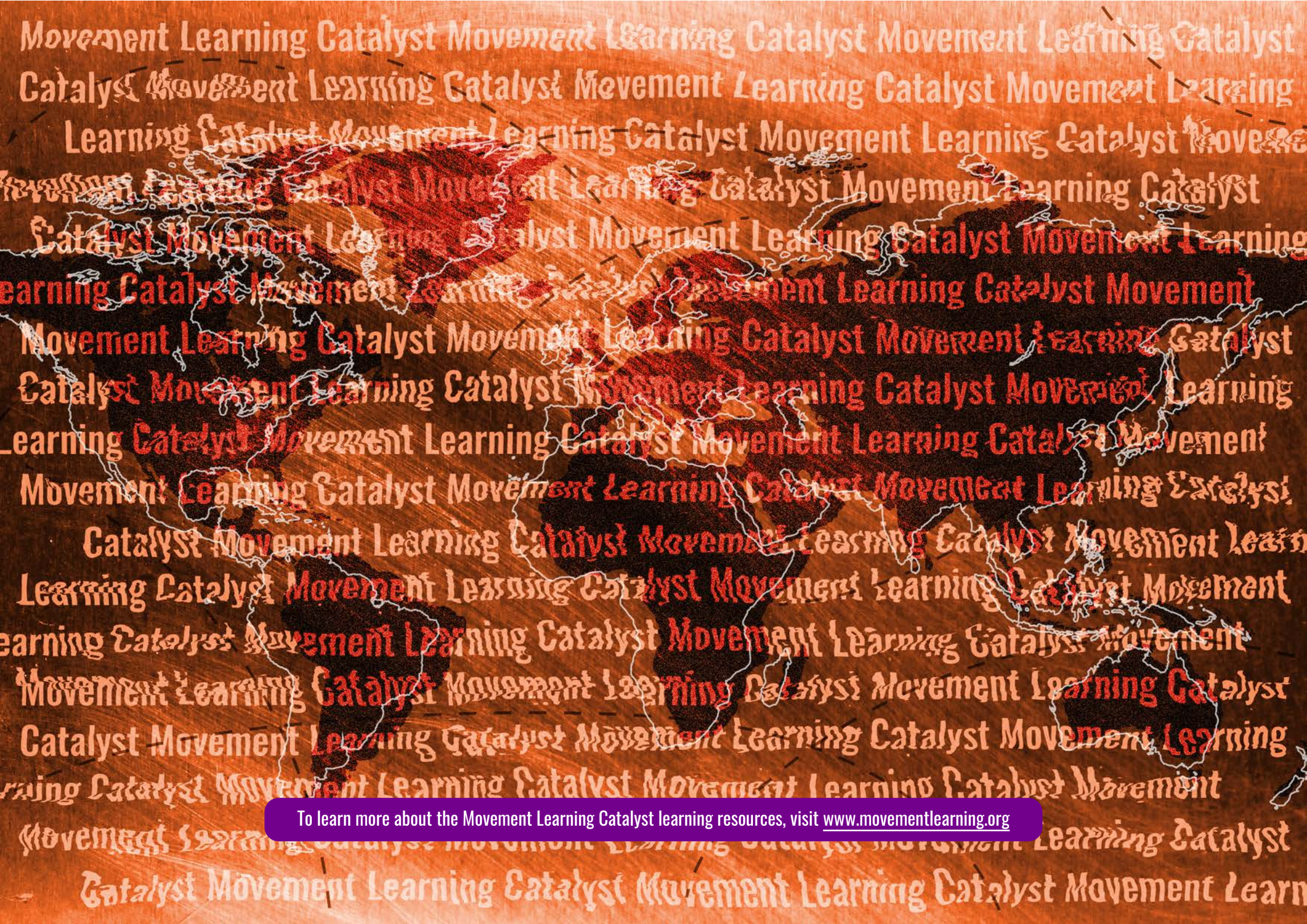

To learn more about the Movement Learning Catalyst learning resources, visit www.movementlearning.org

Strategy and Movements

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Credits

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PART 3
STRATEGY AND MOVEMENTS

INTRODUCTION

There is a widespread sense across social movements in Europe that we've been losing for some time. Along with this comes a sense that our movements can lack ambition to achieve larger scale change that can challenge capitalism and oppression structurally – as well as the experience that we're not coordinating or acting together with a sense of coherence and strategic relevance. None of this is to say that there isn't incredible work going on. Inspiring, creative, and courageous action is taking place everyday within our movements. But too often we're on the back foot, resisting the worst excesses of those doing the damage. Too often this multiplicity of effort doesn't seem to add up, to become more than the sum of the parts, rather than just many moments reminding us that there is beauty and care in the human heart.

The Movement Learning Catalyst guide to learning for systemic change aims to address this sense of malaise. This Strategy and Movements sub-curriculum looks at some of the challenges that make it difficult to develop strategy that can be relevant at scale and over the long term. Bringing a strategic approach to movement building is no small thing! We can find ourselves faced with a range of daunting challenges and obstacles. We think the modules here offer a range of valuable reflections, tools and practices that can help us to address them.

This doesn't pretend to be a comprehensive guide to strategy. Instead, we've tried to focus on what is more specific to developing a strategic approach that takes movements into account (not just campaigns and specific projects). We've also left out a lot of tools that, to us, seem to be widely used and familiar. So, we hope that the resources here will augment already existing strategy tools, rather than trying to gather everything here, at this point. A complementary set of more common strategy tools is included in the resources section.

Learning aims

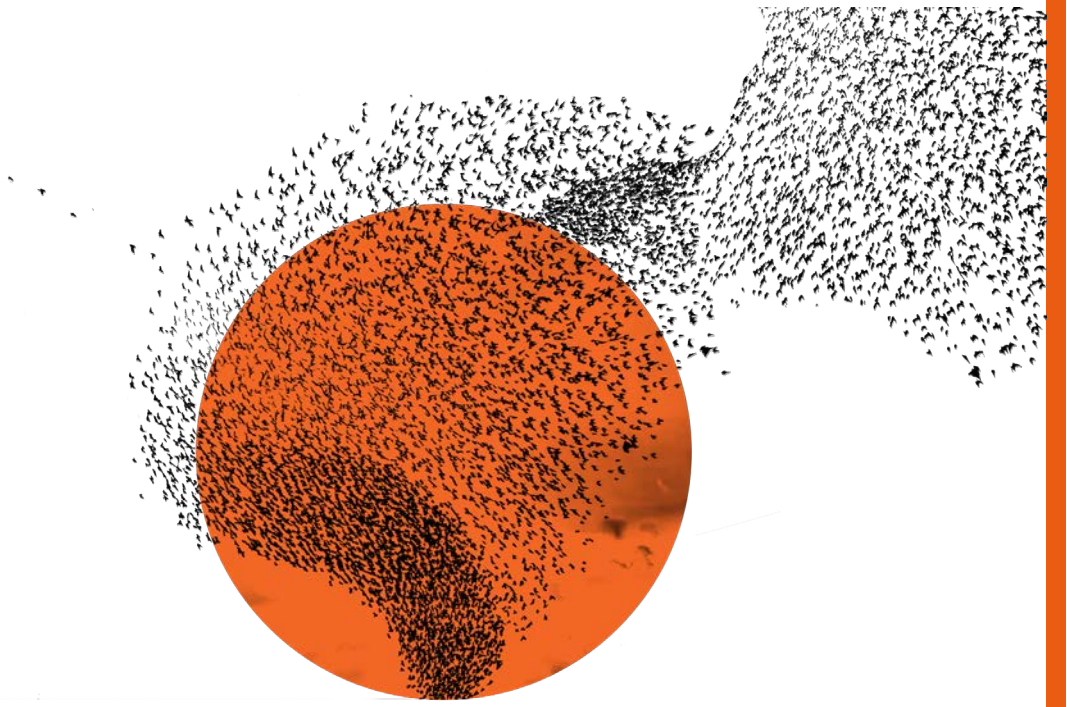
- Describe the six steps of the Strategy Cycle for strategic planning
- Embrace vision and values in shaping long-term goals, cultivate radical imagination, emotional intelligence, and flexibility for adaptive strategizing
- Analyse the context with tools such as SWOT analysis, movement mapping, and PESTLE analysis.
- Analyse and disrupt hegemony through strategic analysis and organising to challenge power relations for large-scale social change
- Apply systems thinking and a complex living systems approach to identify patterns, and underlying mental models.
- Distinguish between theories of transformation and change, and develop critical pathways for strategic alignment

In Module 1, we start with introducing the strategy cycle, which gathers the basic building blocks of a good strategy process and sets us up to explore adapting them to the scale and ambition of movement strategising. It offers a flexible framework that can help us to integrate a wide range of fundamental strategy tools that can contribute to building a coherent and thorough strategic approach. In Module 2, we turn our attention to visioning, values and establishing a sense of direction that will guide our strategizing. In Modules 3 - 6, we explore the various ways we need to research and analyse the lie of the land. We look at the importance of analysing the wider context, making sense of the strengths and weaknesses within our movements, and the mechanisms and forces that are stacked up against us in terms of social reproduction and hegemony. In Module 7, with a sense of direction and a sense of the conditions

under which we are currently operating, we now begin to develop a sense of the pathways and processes that can help us to go from here to there. We look at this at two levels, both the overarching theories we hold about how change happens and the more specific changes that we need to work towards through clear plans and objective setting. In Modules 8 - Nine, we turn our attention to the specific challenges involved in strategising in the face of complexity and unpredictability. We look at the concept of VUCA (the volatile, uncertain, complex, and ambiguous nature of things) and what it takes to develop relevant and responsive strategy in that context.

Considerations for educators

This part takes on big questions and involves looking honestly and courageously at the state of the world and our prospects for affecting change. This can be mentally challenging work and emotionally daunting for learners. But if well supported by educators, it can carry people to a place where they feel their feet on the ground with a sense of added traction to take steps forward as "we make the path by walking" together.



MODULE 1. THE STRATEGY CYCLE

Introduction

This module presents the basic framework of the Strategy Cycle, a six stage process that represents a comprehensive and systematic approach to strategic thinking, planning, and action. It helps us to cover some of the basics of strategy work from the outset, and also provides the basic structure for the curriculum and modules to follow. Developing effective strategies across a movement context needs to be done systematically. Unfortunately, it isn't something we do once and then simply go about implementing our plan until it is completed. Strategies need to be developed, tested, and adapted. Working amidst high levels of complexity and uncertainty, we need both clarity of intention and flexibility. This is why we encourage people to think in terms of a *strategy cycle*. The Strategy Cycle incorporates 6 main phases, which combine to provide a thorough and systematic approach to strategic thinking, planning and acting. This module explains the Strategy Cycle and gives an introductory overview of the phases.

Learning aims

- Introduce the Strategy Cycle for strategic planning, action, and movement building
- Outline the six steps of the Strategy Cycle
- Recognise the importance of a cyclic approach to strategizing to enable reflection, analysis, and adaption to changing circumstances

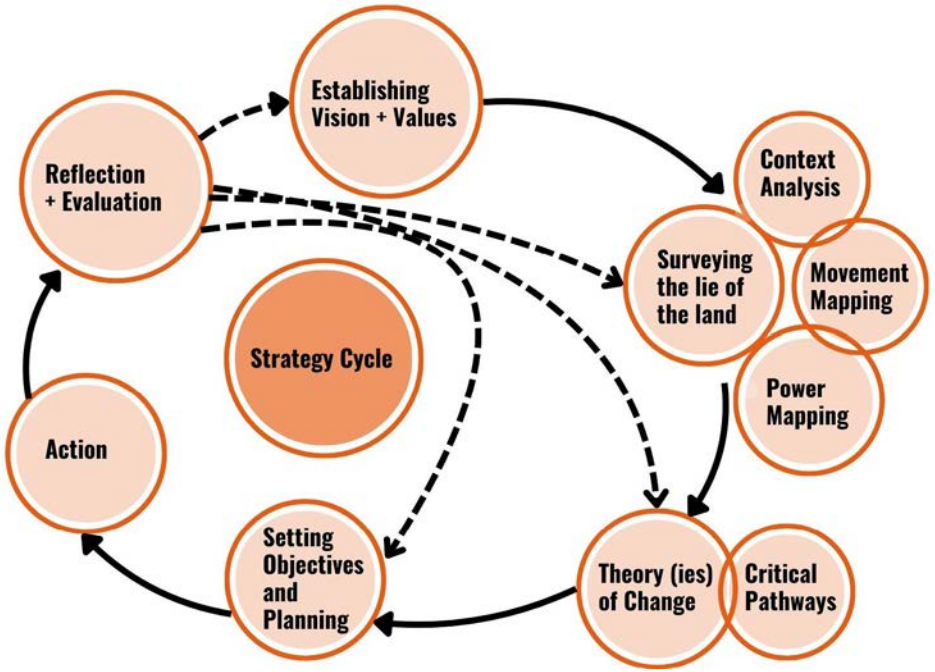


Figure 3. 1. Strategy Cycle by Ulex Project

The Strategy Cycle

Bringing a strategic approach to movement building is no small thing! We can find ourselves faced with a range of daunting challenges and obstacles. To think, plan, and act strategically assumes that we have at least some degree of agency – both as individuals and as groups – that we can influence and shape outcomes and direct efforts that have some likelihood of leading to them. But a social movement is rarely, if ever, something that can be directed. Influence is distributed, difficult to pin down, and can be unpredictable. Both our movements and the wider social field have lives of their own. There is no command and control mechanism. There is no way to ensure that others will act in any specific way.

The larger the scale of the field we want to influence, the more actors involved in trying to shape it, and the more factors beyond our control, the more difficult it is to feel confident that our actions can make a significant difference. Similarly, the longer the timeframe in which we understand our actions, the less direct our influence tends to be, the more likely unanticipated events will change the context we work within, and the more difficult it becomes to predict outcomes.

In the modules that follow we will be trying to suggest approaches and shifts in practice and understanding that can help us to make sense of efforts to be strategic at a movement level, or with movement building in mind. Some of the recommendations take the form of ways of seeing and acting that are quite distinct from more common approaches to strategy. But that shouldn't mean that we neglect to use some of the basic building blocks of effective strategic planning that have proven to be valuable over time in other contexts, such as organisational development or campaigning.

The Strategy Cycle gathers the basic building blocks of good strategy processes and sets us up to explore adapting them to the scale and ambition of movement strategising. It offers a flexible framework that can help integrate a wide range of fundamental strategy tools that can contribute to building a coherent and thorough strategic approach.

Gaining an understanding of the cycle will enable us to familiarise ourselves with all of the key dimensions of strategic thinking and planning, the diverse tools that can be used to attend to each of those areas, and how they combine as a comprehensive and systematic approach.

We frame it as a *cycle* to emphasise the idea that effective strategy, especially in relation to the scale and the complexity of movement work, is an ongoing process of testing, reviewing, and adaptation. We'll come back to this after describing the key elements of the strategy cycle.

Six phases of the Strategy Cycle

Here we present the six phases sequentially. The order has a clear logic, with each element building on the previous one. While we do recommend that you approach the elements of the cycle in this sequence, it is nevertheless worth noting that in reality these different elements might not arise in this order and a degree of moving forwards and backwards in the sequence is inevitable, as we iteratively build our understanding.

1. Establishing vision and values

Here we clarify where we want to go and generate a sense of direction. The shorter term our projects are, the more detailed our vision of our ultimate goals might be. The more long term the project, the more necessarily generalised and indicative our guiding vision will be. To allow adaptation, our vision should be more like a compass than a blueprint, indicating direction of travel, rather than strict delimitation of an expected outcome. To ground our vision and help us to clarify how we will get there, we should also give time to establishing a sense of the values that will inform our action, helping us to embody our vision, as best we can, in the ways we work together.

2. Surveying the lie of the land

To help clarify what action to take, we need to get an understanding of the conditions we will be acting within. This is like carrying out a movement-level SWOT Analysis. There are three aspects to this:

a. **Movement mapping (strengths and weaknesses):** It is valuable to get a clear sense of who we act with. Large scale social transformation requires generating massive support, mobilisation and organisation across a multiplicity of actors or movements. Mapping our movement ecology and the actors and their relationships within it can help us to understand the features of the networks we will be

operating within. It can help us think about the health of the ecology of our social movements. From this we are more able to identify the strengths and weaknesses of our movements and consider where and how we can best contribute.

b. **Context analysis (opportunities and threats):** This involves analysing the context in terms of relevant trends and structures we are working in relation to. For socially transformative work this can include patterns in the political, economic, social, technological, legal, and environmental fields (PESTLE Analysis). Combined with power analysis, this kind of context analysis can help us identify the opportunities and threats we can take advantage of or aim to avoid. To inform this analysis it can be useful to reflect on Mechanisms of Social Reproduction and Hegemonic Structures and the kind of alliances that help to support the systems we aim to change.

c. **Mapping power:** Both movement mapping and context analysis can and often will incorporate an analysis of power within the fields they map. But it is useful to add this stage of power mapping to really take stock of the implications of our mapping and analysis in terms of the power relationships and dynamics at work. We need both a sense of the power our movements have or lack and a clearer sense of what we are up against. This can involve using tools such as power mapping or ally mapping to complement the other data and analysis we've done. It can also involve bringing our understanding of power and counter-power into a synthesised analysis where the relations between the two become clearer. Amongst other things, this can help us to identify points of potential intervention and to understand the kinds of alliances and connections we need to build.

3. Clarifying a theory of change

With an initial sense of our strengths and weaknesses, as well as the opportunities and threats that surround us, we can begin to picture the pathways of transformation that can lead towards the changes we want to see. We can do this using tools such as the *problem centred theory of change* template and the *critical pathways* process. In addition, this stage offers a valuable opportunity to really make more conscious and explicit the assumptions we hold about how change happens and the role of movements and activists within that. The more fully we can expose our mental models to the light of day, the more able we will be to test our assumptions and improve our models over time.

4. Setting objectives and planning

Once we have clarified how we think change could happen and the pathways of transformation that can lead from where we are today towards the kind of future(s) we envision, we can begin to specify objectives and timelines, around which we can coordinate, plan, and delegate tasks and activities.

5. Action

With our plans in place, we get on with it all, ensuring effective coordination, monitoring of progress and accountability to each other.

6. Reflection and evaluation

Once we are carrying out our plans, it is essential that we build in moments for reflection and analysis of how they are working out. Not only do we need to keep monitoring how they are going, we also need to programme times and methods to reflect on and re-evaluate our plans. This enables us to learn from our actions and to refine, adapt, and improve our approach. Because things do always change – often unpredictably and in complex ways – we need to build in the skills for strategizing in a volatile, uncertain, complex and ambiguous world.

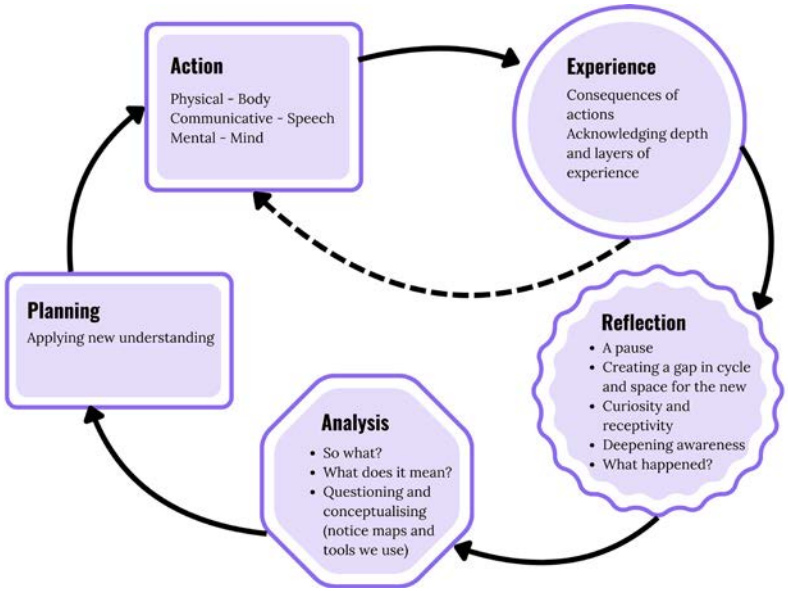


Figure 3. 2. Action Learning Cycle

The strategy cycle as a whole is designed with a structure based on an action learning cycle. This helps to ensure that the reflection and evaluation element is integral to our practice. However, the cycle doesn't necessarily cycle through all 6 stages. From the reflection and evaluation phase we might just cycle back to reorganise our objectives or adapt some of the specific plans. Or we might cycle back to review our context analysis or critical pathways work. On occasion we might even review our vision and values, although these are likely to remain the most constant element and will perhaps only be reviewed occasionally over time, even if it can be valuable to revisit them simply to help us to keep them in mind and stay in touch with our inspiration and deeper sense of shared purpose.

As a starting point for this curriculum, the Strategy Cycle offers an overview of the areas the rest of the curriculum addresses in more depth. It is also an opportunity to enable learners to think through what strategy means to them and the experience they already have of thinking and planning strategically in other contexts. It can be useful to ask people what experience they have of these different dimensions of strategy practice already, in organisations or campaign work, what tools they are already familiar with, and where challenges arose for them. This is important preparatory work before we head into the following modules that take basic strategy concepts and practices and begin to apply them to the significant challenges related to using them with movements in mind.

Learning activities

Reviewing the Strategy Cycle

This activity is used to introduce the strategy cycle and offer a framework for exploring the different dimensions that we dive into across the next few modules. It will establish key concepts and can also be used by facilitators as a diagnostic session to gain some insights into the experience level of learners.

Harvesting tools and experience

Based on initial exploration of the strategy cycle we begin to harvest tools people have used for the different dimensions of strategic work. These can be shared and used by the group to begin to build their own toolkit.

Naming challenges

Here we begin to open up discussions about the differences within strategising, taking into account different scales of intended impact and influence. We'll ask about the challenges that arise as people try to take wider movement dynamics into account and extended socio-political contexts.

Learning Resources

- Brown. A. M (2017). *Emergent strategy : shaping change changing worlds*. AK Press.

MODULE 2. VISION AND VALUES

Introduction

Strategies intend to influence current conditions to shape the future, in one way or another. If we understand strategy as a relatively coherent set of plans or approaches designed to achieve long-term results, it seems clear that the starting point for strategic thinking needs to be a sense of what our strategy is aimed towards. Vision helps us to establish that sense of direction and informs our clarity of purpose. Clarity of values helps to shape the way we'll work together towards realising the large scale changes we want to see.

Learning aims

- Understand the strategic importance of vision and values in shaping long-term goals and strategies in social movements
- Cultivate radical imagination and emotional intelligence by integrating difficult emotions into visioning processes to empower responses to injustice
- Embrace flexibility and collaboration in strategic planning, improve adaptation and responsiveness to context based on ongoing learning

Vision, Values and the Strategy Cycle

Many activists today lament the lack of vision in our movements. They find themselves overwhelmed by the need to resist the tangible and immediate damage being done to our communities and the web of life through unjust and oppressive systems. While we are often clear what we need to fight against, rarely do we find the space or opportunities to give clear articulation to a positive vision of the world we would like to see replace these destructive systems. Commonly, our energies become drawn into firefighting and defensive actions, with short-term immediate goals. As important as that work can be, at times being a matter of survival, it can leave us unable to build the power we need to change those destructive systems at their root. We regularly fail to create the shared narratives that can underpin long-term cooperation and capacity building. Meanwhile, the forces that are stacked up against us apply their resources to gradual consolidation, shifting the terrain upon which we struggle, and creating a sense that history is somehow on their side, not ours.

Lack of vision undermines our ability to take the long-term view. While we find ourselves constantly pushed around by events, we seem unable to address the bigger patterns and underlying structures and mindsets. Inevitably, this erodes our strategic capacity, undermines our continuity of purpose, and makes it impossible to build the large-scale capabilities and alliances we need. Clarity of vision and purpose, on the other hand, makes it possible to be more strategic in our decision making, to ensure that our actions add up over time, and that our resources are applied in ways that will multiply our impact and influence over time, rather than using them up. They underpin our ability to determine relevant objectives, to prioritise and choose our course of action wisely, and offer a basis for cooperation with a sense of shared direction. This is why they are placed at the start of the strategy cycle. Vision, purpose, and values underpin everything else.

Purpose, vision, and values

The internet abounds with management advice on organisational strategy, offering a multitude of ways for developing vision and the ubiquitous "mission statement". As activists we will probably want to avoid falling into corporate management frameworks. Nevertheless, some of the basic ideas can help us understand the different elements of these foundational aspects of the *strategy cycle*. It can be useful to bear in mind four key elements: Purpose, Vision, Values, and Mission.

Purpose names why we are doing what we do. *Vision* articulates the differences we want to achieve and see in the future. *Values* will shape how we do things together, the ethics and principles that guide us. *Mission* refines our focus and refers to the specific contribution an organisation might make towards realising the vision. It can often feel as though the differences between these are a little forced, which is understandable given how interrelated they are. Nevertheless, the different emphasis of each adds up to a useful set of considerations that will help us to guide strategies. A sense of mission is something that needs to be built in relation to our theories of change, which in turn need to be informed by context analysis. So we'll come back to that in a later module. Here we'll focus on purpose, vision, and values, and how they compliment each other.

Radical imagination and the heart

Mark Fisher, in *Capitalist Realism*, lamented how "capitalism seamlessly occupies the horizon of the thinkable" (Fisher, 2009). Fifteen years on, the statement still has resonance and perhaps represents one of the greatest victories of the concerted strategic efforts of the neoliberal era, namely, the erosion of belief in the possibility of a viable alternative vision. It's common for activists to feel that things are just getting worse, that reactionary forces are gaining ground, and that time (especially ecological time) is simply running out. Within these conditions, visioning a better future is tough. Tragically, it is common for activists, especially younger activists interestingly enough, to encounter their sense of hopelessness and despair when encouraged to engage in visioning work.

We shouldn't try to avoid these feelings. To the extent that we suppress the pain, we lose touch with the deeper emotional layers of ourselves, wherein lies our passion, our care, and the energy we need to harness. With this in mind, visioning work needs to be done in a way that is emotionally literate and sensitive. Visioning work shouldn't override the grief, but empower our responses to the conditions of oppression and injustice that give rise to it. We need to allow and expect difficult emotions to arise. Only then can we engage in visioning that serves us authentically.

Finding the balance between generating a guiding vision and acknowledging the reality of the immensity of obstacles we face is no easy challenge. It also takes a lot more than a Gramscian "pessimism of the intellect, optimism of the will," at a time when pessimism of both seem so reasonable!

> "It is no easy matter to make a credible argument that "another world is possible". People are born into societies that are always already made, whose rules they learn and internalise as they grow up. People are preoccupied with the daily tasks of making a living, and coping with life's pains and pleasures. The idea that the social world could be deliberately changed for the better in some fundamental way strikes them as far-fetched – both because it is hard to envisage some dramatically better yet workable alternative, and because it is hard to imagine successfully challenging the structures of power and privilege in order to create it. Thus even if one accepts the diagnosis and critique of existing institutions, the most natural response is probably a fatalistic sense that not much could be done to really change things." (Wright, 2006)

Figure 3. 3. Erik Olin Wright, Berlin, 2011
(Source: Rosa Luxemburg-Stiftung, CC BY-SA 2.0)

Despite all of this, when we can create spaces for visioning together, people usually find it empowering, especially when the difficult emotional dimensions are included. Activists report that they don't take the time for this kind of work, but that when they are given opportunities to hear each other, share visions or dreams, as well as the challenges involved, they find valuable connection and feelings of solidarity. Nevertheless, supporting this involves careful framing to clarify that visioning doesn't mean we need to believe that certain things *will* happen, nor does it require that we pretend that the probabilities are other than they are.

Vision will help us to harness our motivation, our dreams, and our hearts. It will help us to recognise emerging forms that are suggestive of new social realities and put energy behind them.[3] It will help us to know which battles we need to fight and which ones we might need to forego. And it will help us to evaluate what is possible under different material conditions in the light of our radical imagination. Done well, visioning increases our ability to influence things more deeply, despite the recognition that we don't control the outcome.

In a society which prioritises the rational and material, it is common for people to find that their imaginative capacity is a little stunted. The use of creative activities such as physical movement or drawing, and guided contemplative or closed eye visualisation can be helpfully used to support people. It can be important to help people to step back from their sense of the immediate limitations they perceive, and to open up reflective spaces which can allow the emergence of possible worlds and futures in their hearts and minds.

When we can activate these faculties and create spaces to sense our longing and dreams, even in face of massive adversity, we can begin to sense, as Anurudhati Roys puts it:

> "Another world is not only possible, she is on her way. Maybe many of us won't be here to greet her, but on a quiet day, if I listen very carefully, I can hear her breathing."
> (Roy, 2003)

Figure 3. 4. Arundhati Roy, 2012 (Source: Vikramjit Kakati, CC BY-SA 3.0)

Strategic power of embodying our values

Vision helps to orientate us through harnessing our ability to dream and imagine possible futures. Despite the challenges this involves, we can strengthen the power of the radical imagination through our actions in the present. The radical imagination can be powerfully enhanced through experiencing our values and alternatives forms of social relationship, modelled and embodied within our groups, organisations, and communities.

3. For an application of the concept of radical imagination to envisioning an alternative to the current social reality of borders and the prominence of the nation-state, see Part 2. Transnational and Translocal Organising, Module 4. Radical imagination: Envisioning futures beyond borders.

Vision is future-oriented, and this is needed. At the same time, future orientation carries risks. Dominant views and experiences of time today encourage a future orientation which can alienate us from the present. Today's actions can be felt to have meaning only in terms of what they achieve in the future, where we are forever looking ahead and depreciating the present. All too often our actions today are only evaluated in terms of their outcomes. A radical strategic approach also needs to give value to means as ends in themselves.

Prefigurative politics is often criticised for overly emphasising the means as ends in themselves. While this is often the case, this doesn't mean that we should not try to walk the talk, to model our values, and create spaces and ways of collaborating that express our values. This too, is an important part of developing strategies in the face of complexity and large-scale, long-term challenges. So taking time to strengthen our shared sense of values is essential.

It is important that the way we act and organise today is congruent with the kind of future we want to create. Firstly, we need the spaces to create alternative structures, ways of organising, making decisions, ways of working creatively with power. We need spaces to experiment, test, and refine ways for living together differently. Secondly, our groups and networks are the incubators of the very people who will be able to live different future social relations. Not only does society need to change, but we ourselves need to grow and mature into new kinds of people capable of populating new social structures. The ways we organise need to support us to grow into the kind of people who will inhabit the future. We need opportunities to learn new ways of relating and being with each other. The radical future subjects are being born in our actions today. Thirdly, as we began to point to above, experiencing the embodiment of our values, the ways that we can come together in solidarity and mutual empowerment, are an essential part of fostering the radical imagination. When we can model alternative social relations between us, not only do we free the radical imagination to see beyond the horizon of capitalism, a small part of us actually begins to live there. Foregrounding our values also plays an important role in helping us to sustain our motivation and vision in the face of failures and inevitable setbacks we'll experience along the way.

Often we might come together assuming certain alignment of values, but it is important to take time to make these explicit. These might include ideas of free association based on conscious, consenting, and mutually empowering ways of relating, or core ideas such as equity, diversity, and inclusion. They might emphasise the contrast between relationships based on collaboration rather than control, or cooperation rather than competition. While necessarily broad, naming and clarifying the principles and values together will help to guide our choices, the ways we work together, and to build the inspiring narratives that underpin our strategic work.

Values, purpose, and agility

Developing vision and values in organisational strategy is challenging. Bringing these tasks to bear on thinking about movement development is even more difficult. The narrower our sphere of concern, or the smaller scale of the changes we want to bring about, the easier it is to offer a clear vision of the future we want to create and to map out a pathway to get there. When we try to do this on the scale of deeper structural transformation at a societal level we quickly recognise that the more variables and unpredictable elements there are, the more difficult it is to do this convincingly. But this shouldn't put us off. It just means that we need to frame our visioning appropriately and in ways that allow adaptation and flexibility.

There was a time when a great deal of energy was expended drawing up a blueprint for the new society around which large scale movements could be mobilised. Enormous efforts were invested in reimagining social relations, economic models, and technological arrangements that could supersede capitalism and other oppressive systems. And these blueprints informed roadmaps towards new social arrangements, helping to direct coordinated revolutionary action of different kinds. Tragically, these plans often failed to take into account the complexities of society and the human heart. And the only way that a new society could be constructed on the basis of these often technocratic blue-

prints involved massive repression and authoritarianism in an effort to force the complex world to conform to the rigidity of the vision.

Of course, we've learnt something from these histories and any emancipatory efforts to supersede capitalist hegemony today will be deeply wary of falling into the same traps, even if it was still possible to galvanise some kind of popular support on that basis. To some extent we still live in the shadow of that failure and our loss of confidence in the possibility of a better world is still shaped by it. As Perry Anderson wrote: "The only starting point for a realistic Left today is a lucid registration of historical defeat." (Anderson, 2000)

Instead of blueprints and specific roadmaps, it is more useful to use vision as inspiration and purpose and values to offer a shared sense of direction that supports flexibility and enables our strategic plans to adapt responsively.

As we've mentioned in our introduction to the Strategy Cycle, strategizing in the face of complexity and unpredictability needs us to integrate ongoing learning into our plans. The vision and values that guide our strategy need to be clear enough to offer direction and yet broad enough to enable us to adapt as we learn. Almost every solution to a problem will result in new problems we were unable to anticipate. At times this will include adjusting expectations. This might require us to renew our vision, but our values can be used to help us to maintain continuity of purpose.

Perhaps a better metaphor than roadmaps is that of the compass, which offers a sense of direction, but doesn't predetermine the path we will take as we encounter landscapes we were unable to predict lying beyond the horizon. We'll come back to these themes of agility and responsiveness in the later modules on strategy and complexity.

Shared vision

In addition to providing a sense of direction, vision and values also serve to galvanise cooperation and collaboration. In this sense, vision and values intersect with the processes of articulating our sense of social and political community, the "we" who act together in solidarity.

As we explored in *Part 1. Transversal Organising and the Ecology of Social Movements*, our work involves and engages a multiplicity of actors. Building such movements requires a vision that is broad and diverse enough to include significant differences – and yet strong and clear enough to create a sense of collective purpose. The alter-globalisation movement of the 1990's and early 2000's, tried to address this challenge by employing the Zapatista principles and slogans of "One No, Many Yeses", and "A world in which many worlds fit", and we will need to stay alive to the importance of these insights in our own visioning work.

We need to ask ourselves who needs to be involved in our visioning work and use methods for collective visioning that allow diversity while identifying commonality. It is important to find methods that will ensure that our visioning is able to integrate diverse perspectives and needs. We'll need to avoid imposing homogenising perspectives, by acknowledging the partiality of our positions and experiences, and bringing decolonising insights that honour diverse epistemologies and ways of knowing the world.

Expanded visioning

Even when we develop vision just at an organisational level, it can be valuable to use an expanded visioning approach to help ensure that our vision connects with wider constituencies and is resonant with the different stakeholders and groups it aims to engage and inspire. This is even more important when we are dealing with a scope of vision that seeks resonance and relevance across a wide social field and the ecosystems we want to defend.

Expanded visioning opens up from our own limited perspective, seeking to integrate many views and experiences. A starting place is to develop visioning methods that include stakeholders and constituencies who are affected. Ideally it then goes further by drawing on deeper contemplative receptivity, intuitive and emotional dimensions, and even bringing attention to future beings and other species.

We've already mentioned the value of putting our visioning in the context of intergenerational and historic movement experience and timeframes. This can be augmented by drawing on deep time perspectives, that consider the evolutionary history of our planet and the generations of those who will live in conditions affected by our choices today. To vision with future generations and the wider world in mind, we must listen to a wider range of voices than our own, including those of other cultures, species, and generations. And we can take this broadening further. By looking at alternative futures from multiple perspectives, being open to more liminal and dream states, drawing in the faculty of intuition and inviting information from the less-conscious parts of our knowing, we can expand beyond our individual spheres of influence and understanding, greatly enhancing the scope, nuance, and possibility in our visions.

Learning activities

Walking into the future

This is a useful activity that incorporates contemplative methods and simple movement to help people imagine their way into an imaginative future space. The experience is captured in images or words and can then serve as a reference point for other activities.

Future beings and ancestors

We aim to activate the imagination through a playful time travel, where present day activists become the ancestors of future generations who have benefited from their work. They engage in conversation and hear about future worlds where their present day efforts have borne fruit.

Expanded visioning canvas

This template can be used to guide a process of expanding a visioning process to include a wider range of stakeholders and intuitive dimensions of experience.

Blue sky rounds

A simple but effective facilitation technique which provides a simple structure to harvest multiple perspectives, hopes, and inspirations into a shared vision.

Learning resources

- Anderson, P (2000). Renewals, New Left Review.
- Fisher, M. (2009). *Capitalist Realism: Is there no alternative?* Zero Books.
- Roy A. (2003). *War talk*. South End Press.
- Wright, E. O (2006). *Towards a Socialist Alternative.*

MODULE 3. SURVEYING THE LIE OF THE LAND 1 – OVERVIEW AND MOVEMENT MAPPING

Introduction

Before we act we need to survey the terrain of action. There is very little that we do in life where we alone determine the outcome of our actions. In almost every situation our actions come into relationship with other actions, intentions, and conditions that shape the impact of our efforts, blocking them, multiplying them, augmenting, or undermining them. This gives rise to all kinds of unintended outcomes and sometimes simply leads to failure. Although we shouldn't give in to delusions of grandeur, assuming that if only we get our strategies right we can shape the future as we wish, we can definitely develop more informed and better judgments about how to act, where to invest energy and how to improve our timing. To develop plans that are more relevant and well informed we need to take time to better understand the context and conditions with which our actions will interact. This is what we call *surveying the lie of the land*.

Learning aims

- Gain an overview of the strategic step of surveying the lie of the land (using SWOT analysis as a reference)
- Gain an overview and become familiar with tools for movement mapping

Surveying the lie of the land

Building a picture of the conditions that we act within and that will, in part, shape the outcomes of our action involves research and analysis. We need to build up a picture of the different forces at play and how they interact. This involves looking at the wider socio-political context within which we live and act, the actors involved, and the way their interests inform the actions they take. We need to look at our own movements too, to get a sense of their strengths and weaknesses, the cohesion or cooperation that exists, as well as the tensions and fragmentation that can undermine our power. To do this we recommend a series of interrelated analyses:

1) Movement mapping

2) Context analysis

3) Power mapping

The following four modules explore different aspects of these interrelated analyses. Together they represent a large-scale SWOT analysis. If you've done strategy work in the past, SWOT will be a familiar acronym, standing for *strengths*, *weaknesses*, *opportunities* and *threats*. The first two (*strengths* and *weaknesses*) usually refer to the *internal conditions*, the inner state of an organisation, such as what it does well, the resources available to it, the experience accumulated or the vulnerabilities and failings it has. The second two (*opportunities* and *threats*) refer to the external conditions outside of the organisation, the things that surround it, such as growing media hostility (threat) or increasing numbers of people feeling discontent with the way their employers are treating them (opportunity).

Taking this to a movement strategy scale involves an expansion of both of the categories of *internal* and *external*. The internal becomes the whole of the movement. The external becomes the large-scale historical conditions across society, regionally, nationally, and internationally.

Surveying the lie of the land, therefore, enables us to build a movement-scale SWOT, that helps us identify the strengths and weaknesses of our movements and the systemic forces we are up against. Movement mapping enables us to look at the "SW" dimensions, context analysis enables us to look at the "OT" dimensions. With power analysis we begin to bring the two together and look at

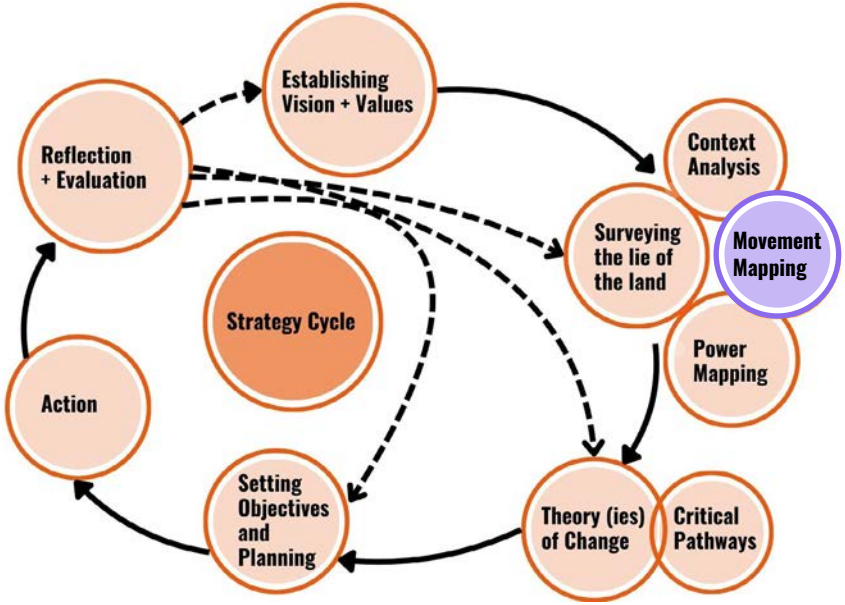
some of the relationships between them in terms of power and influence. The following modules will unpack context analysis and power analysis, here we'll briefly look at movement mapping.

Movement mapping

We introduced the idea and practice of movement mapping in the curriculum in *Part 1. Ecology of Social Movements and Transversal Organising*. If you have already completed those modules, this will be familiar to you. Nevertheless, the use of the movement map here is placed in another context and builds on the previous work (although this module does not require that you have done that module previously).

It is common in campaign work to use tools such as *power mapping* or the *spectrum of allies*. These are valuable tools. Movement mapping can complement these approaches, but it starts with different intentions and takes a distinct approach. Where these strategy tools are looking for points of intervention and analysing the context for specific kinds of action, movement mapping encourages us to turn our attention to longer-term capacity building and setting up conditions to increase our movement power. While our mapping can lead us to identify specific points of intervention, initially we are more concerned with developing an overview and building a sense of the bigger picture.

A lot of the time we can find ourselves firefighting and being forced to respond to an agenda set by our adversaries, the media, or other circumstances. Movement mapping and analysis helps us to step back from short-term, immediate responses and begin to take a longer term and radical view aimed at developing our capacity for deep structural transformation and better understanding our own role within our movements.



Movement mapping helps us to:

- Become better placed to consider strategic interventions that can improve movement resilience
- Learn to think about the relationships within our movements as indicators of strength or weakness
- Improve our appreciation of the diversity of contributions needed for a healthy and effective social movement
- Develop longer term strategic approaches to build deep movement power at scale.

The details of the steps we should take are described in the learning activity linked to the module. But the overall approach involves a series of steps. These are elaborated in the following table.

Movement mapping: key steps

1. **Defining the movement to be mapped:** The boundaries and edges of a movement can be difficult to define. In itself this reflection usefully engages us in thinking about who we build power with, who are "we", and how can we include, or at least be aware of, adjacent actors whose role and positionality can be significant to our projects.
2. **Listing key actors:** One of the basic tasks is to gather information about who is doing what in the movement. What organisations, networks, coalitions, or grassroots groups are active and playing a role.
3. **Reflecting on and analysing power within the movement:** This involves looking at the different actors in their relationship to each other. At this point we are less concerned with the power different actors have to influence the wider socio-political field and more concerned with their relative power within the movement, their power to shape movement dynamics and relationships.
4. **Analysing types of actors and characteristics:** This stage involves applying a set of typologies in order to be able to map different kinds of actors, organisations, contributions, and roles.
5. **Using different typologies to analyse movement ecology characteristics:** Our map needs to be interpreted and made sense of. One useful lens to use for this is the ecology of social movements framing discussed in *Part 1. Ecology of Social Movements and Transversal Organising* (especially Module 1).
6. **Mapping connections:** In addition to mapping who and what inhabits the movement landscape, we can take some time to look at the relationships between the actors. Where are there good and strong relationships? Where are there tensions? What gaps in connection might exist? Analysing the relationships can be enhanced using some concepts from social network theory.
7. **Reflecting, enriching the map, and analysing strengths and weaknesses:** Once we have done some mapping we can begin to subject it to a range of different analyses, including deriving the "SW" part of our SWOT. It is important to bear in mind that what we consider a strength or a weakness will be shaped by our theories of change and we will benefit from revisiting this with more work having been done on that.

Our knowledge will always be limited and it can be valuable to enlist others in the mapping process to augment our own knowledge. Movement mapping offers an opportunity to involve other movement actors in strategic reflection together. Obviously, this needs to be done in a way that isn't merely extractive but can provide useful insights and new understanding for everyone who contributes.

Learning activity

Mapping movement ecology

At the heart of this module is the movement mapping activity. The module only offers one activity due to its richness and adaptivity to learning needs. The activity plan includes a comprehensive series of activities and analyses that together will support a deep inquiry into the ecology of social movements – and can be adapted as needed. The activities are designed to be carried out by activists who are embedded in specific movements, beginning the work based on their direct experience and then augmenting that with research and investigation. The mapping activity is itself a strategic analysis of the existing strengths and weaknesses of the chosen movement. As such it should be used to support strategic thinking about movement building, with learning enhanced by this concrete and practical engagement with existing movement building challenges.

Learning resources

- Ulex Project (2024). Context Analysis.

MODULE 4. SURVEYING THE LIE OF THE LAND 2 – CONTEXT ANALYSIS

Introduction

Continuing our exploration of *Surveying the Lie of the Land*, we move on from *movement mapping* to our first module on *context analysis*. In this module we look at the *PESTLE Analysis* tool and the framework of *mechanisms of social reproduction*. Together they form part of the external analysis we need to do to gain an overview of the different macro-environmental factors that we should be taking into account as we develop our strategic thinking. These tools and concepts can help us to better understand the socio/political factors that can influence future actions and help us to recognise potential risks, threats, and opportunities.

Module aims

- Gain an overview of the PESTLE Analysis tool
- Develop greater awareness of the sources of information and data we use and how we can improve them
- Increase our knowledge about the mechanisms of social reproduction and how this can help us to develop an informed context analysis

PESTLE analysis

PESTLE stands for Political, Economic, Socio-cultural, Technological, Legal, Environmental. PESTLE analysis describes a framework of macro-environmental factors used in the *surveying the lie of the land* component of strategic planning. It is part of an external evaluation when conducting a strategic analysis or doing research, and it gives an overview of the different macro-environmental factors to be taken into consideration. It is a strategic tool for understanding socio/political factors that can influence future actions and provides an understanding that can help us to recognise potential risks, threats, and opportunities. Carrying out a PESTLE analysis can help groups, organisations and networks develop a shared understanding of the context in which they operate. It requires time for reflection and extended discussion.

P Political	E Economic	S Social	T Technological	L Legal	E Environmental
Political context, influence of government stability, policies, decisions, corruption etc...	Economic context, influence of economic performance, growth, inflation, cost of living, purchasing power, unemployment.	Social context, influence of demographic characteristics like age distribution, diversity of races, cultures, income levels, education, religion...	Technological context, influence of technology, research and innovation, automation, AI	Legal context, influences of legislation and policies.	Ecological context, influences of climate change and other environmental transformations.

Figure 3. 5. PESTLE analysis model

The process involves taking each area in turn and identifying important existing conditions and potential changes and then listing them. Later, one takes time to reflect on how the factors in each area can interact.

Political factors: relate to how the government or transnational institutions intervene in the economy and other social relations. Specifically, political factors include areas such as tax policy, labour law, trade restrictions, tariffs, border control, and political stability. Political factors may also include goods and services which the government aims to provide or be provided, as well as those that the government does not want to be provided or seeks to prevent. Government interventions have a high impact on the health, education, security, and infrastructure of a nation or other politically defined areas such as a municipality, trade block, or other political union (e.g. European Union). Also included here are the emergence of new political formations and parties.

Economic factors: include economic growth, interest rates, exchange rates, inflation rate, mechanisms of distribution. These factors greatly affect citizens, businesses, and civil society organisations. For example, interest rates affect a firm's cost of capital and therefore to what extent a business grows and expands. Exchange rates can affect the costs of exporting goods and the supply and price of imported goods in an economy. Growth and distribution affect economic security and confidence of citizens.

Social factors: include the cultural aspects and health consciousness, population growth rate, age distribution, career attitudes, social cohesion, tolerance of diversity, integration of marginalised groups, etc. For example, the ageing population may strain welfare provision, change in gender roles may disrupt traditional expectations, access to education and housing may affect wellbeing and perceived opportunities.

Technological factors: include technological aspects like R&D activity, automation, technology incentives and the rate of technological change. These can affect productivity levels, influence digital security and surveillance, and impact on methods of communication and narrative, big data analysis, etc.

Legal factors: include discrimination law, consumer law, antitrust law, employment law, health and safety law, civil and human rights, laws related to public order and the criminalisation of protest, and the reporting and registration requirements of Civil Society Organizations (CSO's).

Environmental factors: include ecological and environmental aspects such as weather and climate change, access to water, flooding, which may especially affect certain industries (such as tourism, farming, and insurance) and certain sectors of the population. Furthermore, growing awareness of the potential impacts of climate change is affecting how states and companies operate and the products or services they provide and offer.

It can sometimes be difficult to categorise factors in terms of political, social, economic, and so on. Some things feel as though they could belong to more than one category. It is probably not worth investing a lot of time in trying to resolve such doubts. The important thing is to use the PESTLE categories to ensure that we are surveying the whole range of factors that could prove to be relevant.

When we undertake a PESTLE Analysis it is important to bring awareness to the sources we draw on for information and think about how we can augment them.

- Where do you get your information?
- Which analysis and commentary on these developments do you use or follow?
- What are the biases and built-in filters that these sources are subject to?
- How could you improve the channels of information that you depend on?
- How can you balance getting access to data and information without being overwhelmed?

A PESTLE Analysis is a standard tool for looking at developments that can shape the wider conditions within which we are working. It involves identifying the *political*, *economic*, *social*, *technological*, *legal*, and *environmental* conditions that are salient and relevant. But this presumes that we have some kind of framework that can help us to evaluate the relevance of trends and events. To explore this we turn to the concept of *mechanisms of social reproduction*.

Mechanisms of social reproduction

Carrying out a strategic analysis of the context relevant to socio-political action requires some theoretical frameworks to help us to identify what factors are most relevant. If we are concerned with large-scale structural change, obviously we need a way of making sense of the ways power is held and operates, both in the ways the current system resists certain transformative efforts and the ways that counter-power emerges and challenges the system. A useful model for understanding the way our current socio-political system maintains itself and resists challenge is a basic theory of social reproduction – or the mechanisms a social system has that enable it to resist certain kinds of change.

The basic proposition that underlies a theory of social reproduction is that any social system that systematically causes harm, that is exploitative and unjust, requires mechanisms that prevent efforts to make it more just, equitable and less harmful – or, to put it another way, it requires means to reproduce the existing order in the interest of maintaining the injustice or balance of power.

We know that when people experience harm and injustice against them, they will try to do something about it. They will try to resist injustice and to reduce the harm they are subjected to. As Manuel Castells writes in his book *The Power of Identity* (Castells, 2003):

> "Following an old law of social evolution, resistance confronts domination, empowerment reacts against powerlessness, and alternative projects challenge the logic embedded in the... existing order." (Castells, 2003)

And yet, positive change doesn't seem to come easily. What accounts for the lack of positive change? Quite simply, what blocks change towards a more just and less damaging or extractive future are the mechanisms of social reproduction. So, what are these mechanisms? How do we think the existing social system reproduces itself and resists transformative efforts?

Four mechanisms of social reproduction

Building on the work of Eric Olin Wright in his book *Envisioning Real Utopias* (Wright, 2010) we can identify four especially important interconnected mechanisms that a) obstruct individual and collective actions which would be threatening to existing structures of power and privilege, and b) channel actions in such a way that they positively contribute to the stability of those social structures. They are elaborated in the following table.

Mechanisms of social reproduction (By Eric Olin Wright)

1. **Coercion:** Mechanisms which raise the costs of collective challenge: This includes the state monopoly on violence and use of force, the enforcement of unjust regulations and legal structures, direct attacks by both state and non-state actors, and the range of threats these forces enable.

2. **Institutional rules:** Creating gradients of collective action opportunities: This includes the procedural "rules of the game" which make some courses of action difficult to pursue and others much easier. The system is structured to ensure that higher risk and cost is involved in courses of action that threaten the system and less risk or cost involved in those that don't threaten the stability of the system or that can be more easily accommodated. For example, the way that capitalist democracy channels social conflicts in ways that tend to reproduce capitalist social relations.

3. **Ideology and Culture:** Mechanisms which shape the subjectivities of actors: *Ideology* includes the conscious aspects of subjectivity, the beliefs, ideas, values, doctrines, and theories that provide legitimacy and a sense of the normality or "common sense" to the existing system. *Culture* includes the unconscious aspects of subjectivity, such as dispositions, habits, tastes, and skills that shape people's participation and the structures of the system. Ideology contributes to social reproduction when beliefs that contribute to social stability are affirmed in the daily practices of individuals. Perhaps the most important aspect of belief formation bearing on the problem of social reproduction are beliefs about what is possible.

4. **Material Interests:** Mechanisms to tie the welfare of individuals to the functioning of existing structures: Within the current capitalist system, when it is functioning well, the material interests of most people depend to a high degree upon successful capitalist economic activity. This almost universal dependence of our material interests on the pursuit of profits by capitalist enterprises is possibly the most important mechanism of the social reproduction of capitalist society. As long as capitalism effectively ties the material interests of the majority of the population to the interests of capital, other mechanisms of social reproduction have far less work to do.

These four mechanisms interact to support social reproduction. Rules work best when believed to be legitimate or following them is seen to be in one's material interest. Coercion is more effective when rarely used because most people comply out of self-interest. We can see how the predominance of one or the other of these mechanisms differentiates *hegemonic* from *despotic* systems.

In despotic systems, coercion and rules bear more of the reproductive burden, while ideology and material interests mainly function to reinforce coercion and rules. Order is primarily ensured through fear, repression, and compliance. Whereas in the hegemonic systems that predominate in the European setting today, ideology and material interests play a more central role. The active consent of the majority of the subordinate classes and groups are crucial, based on the belief that willingly participating in reproducing the existing structures is both in their interests and the right thing to do. Elite groups holding power are seen as providing legitimate "moral and intellectual leadership". In a hegemonic system, institutional rules carry a greater burden, containing arbitrary or self-destructive forms of repression, facilitating class compromise and rough ideological consensus, while channelling the behaviour of both subordinate classes and the elite in ways that stabilise the system. In many places we'll see a mix of despotic and hegemonic systems at work, depending on our social class or the privileges we have.

The four mechanisms framework gives us a basic understanding that will help us to identify general PESTLE Analysis elements that are more or less relevant. But we can also use the framework to shape specific questions that will augment a PESTLE Analysis, such as:

- In what ways are the material interests of key groups (both privileged and subjugated) tied to the existing order? Are there ways these links are being weakened or changing?
- What are the most relevant mechanisms of coercion in your context? How are these changing? Are a specific risk and threat analysis required? What systems are in place to weather repression or resist coercion?

- What developments are taking place in terms of institutional rules? Is the gradient for challenge steepening or not? In what ways?
- What are the dominant narratives lending legitimacy to the current power relations? Where are these narratives most vulnerable? What counter narratives are emerging and who is articulating them?

Learning activity

PESTLE Analysis

This activity offers structure and prompts to support participants to work through a PESTLE Analysis. It can be used as a "trial run" activity to develop familiarity with the tool and generate an opportunity to address challenges before being used by participants groups or an actual full PESTLE Analysis process can be built into the training.

Mechanisms of social reproduction

Taking the key concepts related to the mechanisms of social reproduction, participants use these as an analytical lens through which to examine a specific context or situation. It works well as a compliment to the activities related to the hegemony analysis we look at in a later module.

Learning resources

- Ulex Project (2024). Context Analysis.
- Castells M. (2010). *The power of identity*. Wiley-Blackwell.
- Wright, E. O. (2010). *Envisioning Real Utopias*. Verso. Ch. 8, 9, 10, 11.

MODULE 5. SURVEYING THE LIE OF THE LAND 3 - HEGEMONIC POWER AND HOW TO CHANGE THE WORLD

Introduction

How is it that despite break-neck technological development, rapid cultural transformations, and dramatic political changes, so many things – fossil fuel capitalism, patriarchy, global race structures, economic inequality – stubbornly persist and even intensify? And what could bring about genuine change? The radical analysis of hegemony – the social alliances that underpin power in society – is key to answering both questions and to developing strategies for radical transformation. It can play a valuable role in surveying the lie of the land and analysing power in society.

Module aims

- Reflect critically on why we might take different strategic approaches seriously
- Understand the basics of hegemony from a movement point of view
- Identify the key principles of organising to disrupt hegemonic social relations
- Think strategically on the level of large-scale social change

Why are good ideas not enough?

Around the year 1919, European radicals thought they had worked out how to change the world: the Russian and Irish revolutions at different ends of the continent, the Ghadar uprising in India and the diaspora and the Egyptian revolution, the collapse of the German, Austro-Hungarian, Russian, and Turkish empires, the development of parliamentary nation states as the "new normal" and a wave of uprisings and general strikes from Seattle to Hungary seemed to mark the coming to maturity of earlier movements and struggles - not least Italy's "two red years" in which peasants seized the land and workers occupied their factories.

Just a few years later, Mussolini's dictatorship was firmly in power and fascism was on the rise across Europe; Stalinism had taken hold of the new Soviet Union and the gender and cultural experimentation of earlier decades was coming under extreme pressure even before the 1929 economic crash. In a series of fascist jails, one of the key activists of Italy's "two red years" started to devote his energy to understanding what had happened. How had all the energy and courage, and the ideas that seemed so convincing at the time, been defeated – and what could make a difference next time?

One advantage that the radicals of the 1920s had over many movements in the global North today was a deep and detailed understanding of the struggles that had gone before them, and a clear internationalist perspective. Different strategic perspectives existed in competing organisations, each with their own relationship to earlier movement history - and could also be compared across countries and continents. These organisations and movements were also understood as (in one phrase) "the memory of the class" - a way of transmitting learning from experience among activists who had very little access to higher education but put a lot of energy into developing their own spaces for thinking, discussing, and researching – spaces that were not owned and shaped by states, corporations or academia.

Another feature of this generation is that they had personally been involved in genuinely mass and international movements that had (temporarily) overthrown deep-seated power structures and cultural routines. By the 1920s the survivors had had time to think about what had happened and learn from their own mistakes - something which is normally part of getting good at everyday activities, but which we rarely do around social transformation.

Antonio Gramsci (1891-1937) had been a key organiser in the workers' council movement of industrial Turin during the two red years. Italian "unification" (1861-71) had in practice been the colonisation of the "South and islands" (Sardinia and Sicily) by the industrial North, with deep-seated racism in the North; Gramsci was Sardinian, and disabled. From 1924, with fascism in power, he became the leader of the Communist Party, which was partly underground and partly in exile; he was arrested in 1926 and spent the rest of his life imprisoned, dying in 1937 of from health complications related to his imprisonment.

At Gramsci's trial the prosecutor famously said, "for 20 years we must stop this brain from functioning". But in fact his prison notebooks contain a huge amount of coded political thought, not least of which was developing the idea of *hegemony*, carrying on the strategic reflections he was working on when arrested. This idea combines an attempt to understand how fascism had become so powerful so rapidly, despite the huge mobilisations of the two red years and the global revolutionary wave, with an alliance-building strategy for social transformation. This strategy would become hugely powerful in the Italian resistance to fascism, and for many decades after the war, when Italian social movements and the left managed to bring together many different groups across differences of gender, class and racialisation.

How hegemony works

At its simplest, the idea says that *any* social order (outside hunter-gatherer societies) is a structure of alliances around a particular leading group. This is part of what makes different kinds of society possible: not only the existence of different leading groups, but also different alliance structures and different groups which are not part of the alliance. One way of thinking about this is as "consent armoured by coercion": there are definitely groups outside of the alliance whose support isn't needed and are therefore subject to (military, police, social) violence. But this can only work with consent, not only of those who exercise the violence, but of other powerful social groups who are broadly happy with the existing state of affairs and at best only want minor changes.

This alliance structure is also part of what makes change possible, and explains why most social orders (e.g. in recent history neoliberalism, fascism, welfare-state capitalism, state socialism, the national-developmentalisms of the postwar global South etc.) only last a relatively short space of time: alliances are complicated to hold together, even though they can be incredibly powerful and seem inevitable when they are at their peak. Social change erodes them, and movements can disrupt these alliances and create different ones. Of course this includes "movements from above" (with privileged access to state violence, economic power and cultural status). We are currently seeing such movements attempt to reshape many societies. Figure 3. 6. shows what hegemony can look like at the height of its power, at least within a single society:

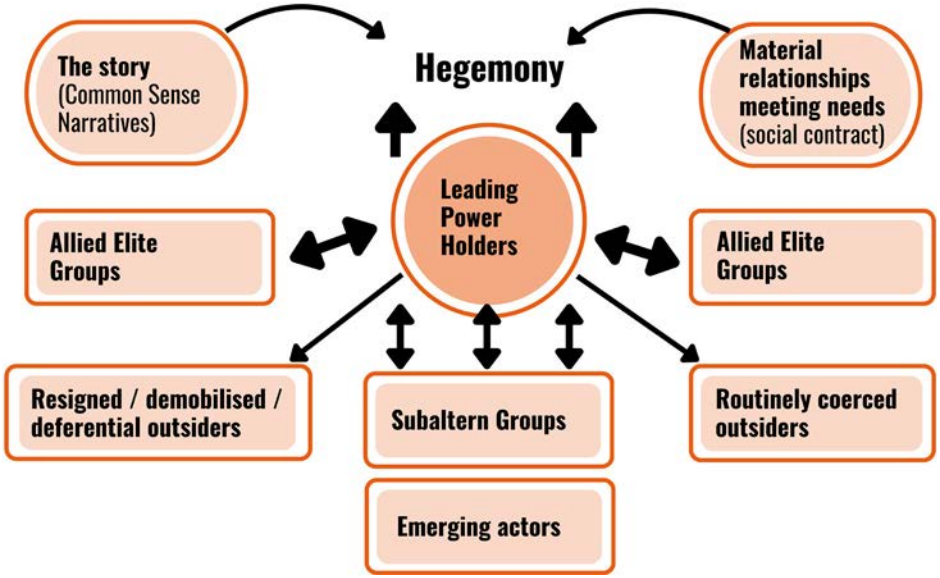


Figure 3. 6. Mapping Hegemony by Natasha Adams (2024)

"Leadership" here means setting the direction across society as a whole for broadly agreed social strategies: e.g. growth, development, modernity, and being accepted as the real authority defining how to do this. The leading power holders here include the central factions within leading corporations and financial institutions, within the state and international bodies, and within media, academia etc. Until relatively recently, "neoliberalism" was a good-enough definition of what they shared as a strategy. This group also controls the use of coercion (violence) against social groups who are not allied with this, but crucially organises the alliances with other groups who give their consent to this in different ways. This involves not just shaping "the narrative", everyday common sense, but equally meeting material needs and fulfilling whatever social contract is felt to exist.

For movements from below (without ready access to state power, concentrations of capital, or the benefit of social hierarchies of race and gender etc.) the strategic space is *everywhere else*: the groups which (for now) are allied with the leading group and give consent, but also those which are coerced or inactive. Some of these are elite groups. These include those which could swing other ways but whose leadership currently supports the way things are (think major political parties and corporations, media and social media conglomerates, economists etc.) but also those who normally simply support whoever is in power because they are in power (police and military often behave like this). When these groups disagree about the direction of travel, there are more opportunities for us to reshape things elsewhere in society.

Most people, however, are not in these elite groups, but either give their consent in various ways, are coerced, or simply inactive. "Routinely coerced outsiders" – often groups such as the homeless, asylum seekers, nomads, prisoners and so on – struggle to be organised both because of things like small numbers, poverty, extreme stigmatisation, political exclusion and because of the extent of violence they experience in daily life. Conversely, social groups can be "resigned, demobilised, or defeated" if they have (or had) the capacity to organise effectively but don't see any chance for doing so at present. "Emerging actors" might have the potential to be significant long-term political actors in the future (as movements, identities, communities) but they have not gotten there yet in terms of their own organising. All of these are, of course, areas where social movements can make a big difference in supporting people to organise themselves, offering solidarity of many different kinds, and helping to bring these groups into new kinds of alliances from below.

The most complicated space is "subaltern groups", which in some ways might be said to objectively lose out from the overall direction of society. Nonetheless, in their organised activity these groups broadly support leaderships or organisations that are part of the system and who are seen as bringing (selective) benefits for supporters. For example, this is often visible for small farmers across Europe, supporting organisations led by big farmers – which have won easy gains from the EU – while the poorest farmers continue to lose out and their children leave farming.

However, more numerically important groups include manual and white-collar workers (e.g. teachers, nurses, shopworkers) who support union leaderships that mostly seek only minor improvements in wages and state provision; or women, LGBTQ+ people, and ethnic minorities who see symbolic representation in media, token inclusion in political or corporate leadership, or the creation of niche markets as the limit of what is possible. In the extreme case, where hegemony is near-total, there are small but real gains for organised members of these groups, and particularly for their leaderships, in return for their consent to the wider arrangement. In these subaltern groups the role of social movements is to try and disrupt people's allegiance to the status quo and to support groups and ideas that seek broader systemic changes around e.g. race, class, gender, sexuality, dis/ability etc. within society.

How hegemony breaks down

By contrast Figure 3. 7. shows the situation in moments of deep crisis:

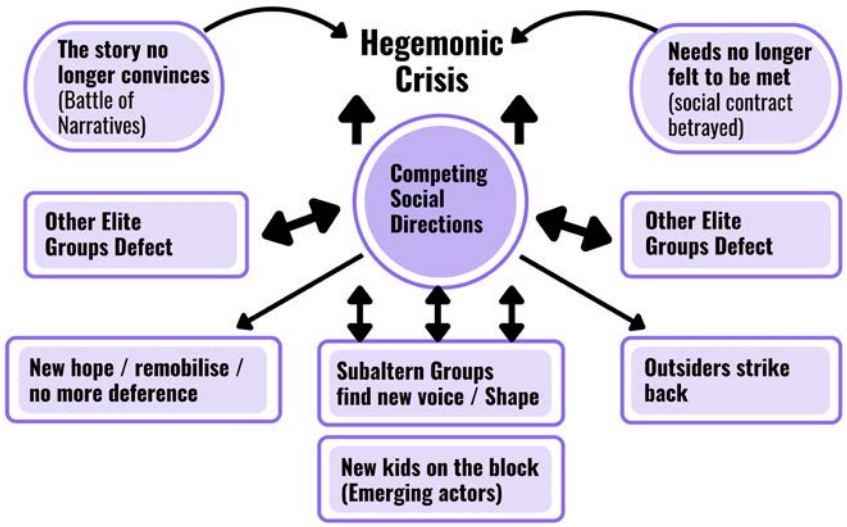


Figure 3. 7. Mapping hegemonic crisis by Natasha Adams (2024)

In a moment of crisis there are competing social directions (e.g. "sensible centrist politics" vs the populist far right); there is a battle of narratives about the future, and the social contract is felt to be betrayed (e.g. around access to housing, health or stable employment etc.). Different elite groups are considering their strategic options for the future, having internal conflicts over which direction to take, or simply defecting.

Once-coerced outsiders are taking matters into their own hands in various ways (which often frighten most people). Groups which have been passive for a long time are finding new hope and taking action again. And emerging actors are coming onto the board and reshaping the rules of the game. Within the large subaltern social groups that have previously been supporting the status quo, the old (clientelistic, co-opted, corporatist etc.) leaderships and organisations are being challenged by new movements and internal revolts, helping these groups to find a new voice and speak for their more general needs.

Most importantly, across all of these groups, alliances with the power holders are being broken and new alliances are being made "from below and to the left", in the direction of a different kind of society. The point of analysing hegemonic crises is not simple description but to help movements think strategically about how they can contribute to this process.

The uses of hegemony as an idea

What the idea of hegemony can help us do is:

- Map the structure of alliances that helps to structure society, including their weak points
- See where these alliances can be disrupted and different relationships developed "from below
- Support the development of self-organised popular agency in the different spaces identified (emergent, coerced, resigned, subaltern)
- Develop different structures of alliances between all of these "from below and to the left"

This is obviously strategy on a very large scale, involving bringing many different social groups together and working with a wide variety of movements – but this is the kind of scale needed for large-scale social transformation that will actually benefit most people in society.

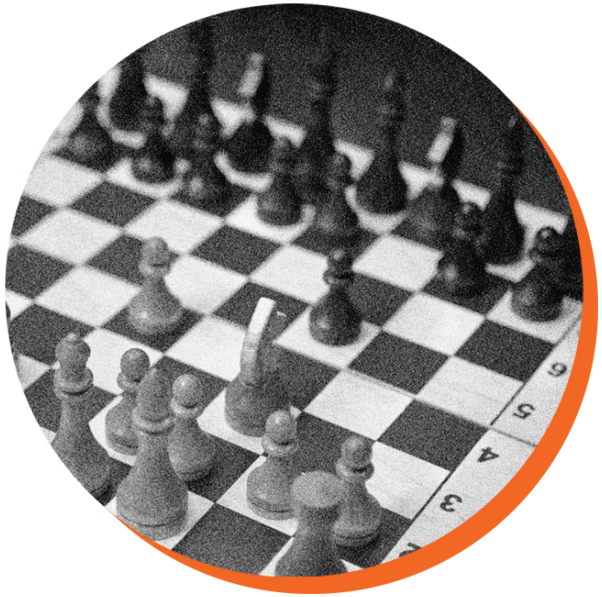
Learning Activities

Mapping hegemony and disrupting power

Mapping the current shape of hegemony within your own society (or around a particular issue) and identifying where existing alliances can be disrupted, where self-organisation is happening and can be supported, and how new kinds of alliances can be built.

Learning resources

- Adams, N. (2019). *Mapping hegemonic power in a time of monsters*. Blog post from 'Thinking, Doing, Changing'.
- Cox, L. (2024). *Social movements and hegemonic struggle*. In: The Elgar Companion to Antonio Gramsci. Elgar, pp. 370-387.
- Ulex Project (2024). Context Analysis.



MODULE 6. SURVEYING THE LIE OF THE LAND 4 – CONTEXT ANALYSIS AND VUCA

Introduction

In some of the following modules we'll dive more deeply into ways that we can build into our strategic practice awareness and understanding related to complexity. But in this module we introduce a couple of tools that are specifically helpful in relation to context analysis work. Scenario planning offers a simple framework for building pictures of various possible futures by cross-referencing key variables. The second tool can help us to get under the surface of events and turn our attention towards patterns and underlying conditions that are more likely to have more enduring relevance over time. Both of them can help us to take account of the ever changing and unpredictable field as we *survey the lie of the land*.

Learning aims

- Learn to apply specific tools to strategic context analysis that can help to take account of complexity and unpredictability
- Gain familiarity with the way that systems thinking approaches encourage us to look at the relationships between events, patterns, structures, and mindsets
- Improve ability to identify key variables and their interplay in the generation of possible future scenarios

Context and complexity

Our socio-political work takes place under circumstances that are volatile, uncertain, complex, and ambiguous - or VUCA! The acronym was coined by military strategists in the 1980's in an attempt to describe the characteristics of the world withing which they found themselves operating. It was designed to help them improve their ability to respond to those conditions strategically. We'll be diving more deeply into the VUCA characteristics of our world and the implications they have for strategy in module 8, but here we'll just look at two tools that can help us to take VUCA more adequately into account as we develop a context analysis.

Developing strategic plans can all too often feel like a waste of time, especially when circumstances are constantly changing unpredictably. Unless we know what the future will be, how can we ensure our plans are going to be relevant? One of the ways we can try to improve the value of our strategizing amidst complexity and transience is to build more agility and responsiveness into our work. We have discussed doing this by building an action-learning process into our strategic approach. But we can also simply do a better job of anticipating a range of possible futures and develop plans that have taken some account of that variety. This approach is what we call scenario planning.

> "We plan. God laughs."
> Yiddish proverb.

Scenario planning

This is a tool that can help us to mitigate some of the risks and difficulties of developing strategy in complex and unpredictable circumstances. Rather than looking forward toward a horizon beyond which lies the unknown, scenario planning enables us to consider a range of possibilities and take steps to prepare for many eventualities. The scenario planning tool can:

- Provide a framework for thinking about variable conditions and contexts relevant to strategic planning
- Enable us to better think strategically under changing and unpredictable circumstances
- Increase confidence that we can think and plan strategically, despite complexity and unpredictability.

The scenario planning tool

Originally developed by the Shell corporation, it was later adapted by one of the founders of permaculture, David Holmgren, in his book Future Scenarios (Holmgren, 2009). The book offers an accessible and useful overview and application of the tool. But the basics are simple enough and can be outlined in just a few minutes (for more on this approach see learning resources, Holmgreen, 2008).

The tool uses a simple four-part grid with two axes. Each axis represents an important variable. By using the two variables on the two axes, four potential future scenarios are generated. Under each combination of key variables a future scenario can be imagined that is shaped by these factors. These are each imagined and their characteristics considered. Each scenario represents a different potential future context, to which strategic analysis and planning can be applied.

Here's the example Holmgren used (bear in mind that when he was working on this the concept of "peak oil" still had a lot of currency):

Holmgren's two variables are 1) the rapidity of the onset of high impact climate change on one axis and 2) the speed at which "peak oil" is reached, leading to significant shortages of fossil fuel supply relative to demand. Each of these variables can be fast or slow and mapping these two variables onto each other gives him four possible scenarios, which he fills out imaginatively by thinking about the patterns and tendencies that are likely to be shaped by the variables. These are Holmgren's four scenarios:

1. Green Tech (slow peak oil + slow climate change): It has characteristics that include: sufficient climatic stability for effective cultivation, time available to build global political will and transition strategies, global system of production gradually reformed, global democratic institutions predominate.

2. Brown Tech (slow peak oil + rapid climate change): Fossil fuel dependent system endure for a while more, climate chaos strains food production and has extreme impacts in terms of flooding, drought, and other extreme weather events, mass migration ensues, militarization is used to consolidate global injustice and increasing authoritarianism and protectionism prevail.

3. Earth Stewardship (fast peak oil + slow climate change): There is a breakdown in the global systems of production and distribution dependent on fossil fuels, long distance war is costly to pursue, vast trapped assets collapse the global financial system, at the same time relatively benign climatic shifts allow a return to more localised and sustainable/regenerative food production, the inevitable localisation has cultural and political impacts including bioregionalism and more participatory democratic structures. For Holmgren this is where permaculture really comes into its own.

4. Lifeboat Scenario (fast peak oil + rapid climate change): Simultaneous breakdown of fossil fuel dependent global system and predictable climatic systems make even local food production very difficult, small groups develop survival strategies, tribal/militia group struggle for limited resources, some walled communities try to preserve the learning and culture of the past. It's not pretty.

	Rapid Peak Oil	Slow Peak Oil
Rapid Climate Change and Chaos	**Life Boat Scenario** • Insufficient climatic stability for effective cultivation • Breakdown of production and distribution • Largescale disruption to food supply • Small scale survivalist type social groups	**Brown Tech** • Fossil fuel production maintained • Strain on food production • Elite groups fortify their position • Increased militarisation • Increasingly authoritarian and despotic social order
Gradual Climate Change	**Earth Stewardship** • Sufficient climatic stability for effective cultivation • Relocalisation of production and economy • Largescale disruption to industrial production • Diverse localised social organisation	**Green Tech** • Sufficient climatic stability for effective cultivation • Globalised economy and production sustained for some time • Time to build wider political will and implement energy transition • Democratic institutions strengthened

Figure 3. 8. Future Scenarios, adapted by Holmgren (2008)

Holmgren's example is on a large global scale, but the tool can be used to explore almost any useful range of variables that are relevant to the context you want to analyse and thereby generate potential scenarios or envisage potentially relevant contexts which we can bear in mind as we develop our analysis and plans. Some examples we have seen used recently include:

Example 1. Political scenario

Axis One: The far right wins the next election – the liberal opposition wins the election.
Axis Two: With a large majority – With a small majority.

Example 2. Economic scenario

Axis One: Economic stagnation – economic decline.
Axis Two: Austerity policies harden – Mild social distributive policies prevail.

Example 3. Environmental scenario

Axis One: Significant increase in impacts of extreme weather felt directly by the European population in 2025 – No increase during 2025.

Axis Two: Shift in narratives see sabotage gaining increased legitimacy in mainstream – it remains marginal and seen as illegitimate.

We can use a wide range of variables, depending on which ones will importantly affect the contexts for which we want to be developing plans. The key to effective scenario planning is to identify relevant variables and to take the time to really think through the implications of each scenario generated. It can be useful to apply an entire PESTLE analysis to each scenario. This is a challenging activity and demands substantial work and thought, but no-one said that being strategic in a complex world would be easy! The full process is detailed in the learning activities that accompany this module.

The systems thinking iceberg

Another useful tool that can help us to take better account of complexity and transience is the Systems Thinking Iceberg (STI). The STI is a conceptual model used to understand complex systems and their underlying structures. It is based on the metaphor of an iceberg, where only a small portion is visible above the surface, while the majority of its mass lies beneath the waterline. Similarly, in complex systems, there are visible, tangible elements that result from underlying structures and mental models.

STI helps us gain a deeper understanding of complex systems, uncovering the root causes of problems and identifying effective strategies for intervention and improvement. Rather than being overly fixated on the fast changing surface of events, news cycles, or latest high profile issue, by training ourselves to develop a way of seeing that tries to identify patterns and underlying structures or mindsets, we can develop strategic approaches that are more likely to retain relevance over time and address deep rooted conditions.

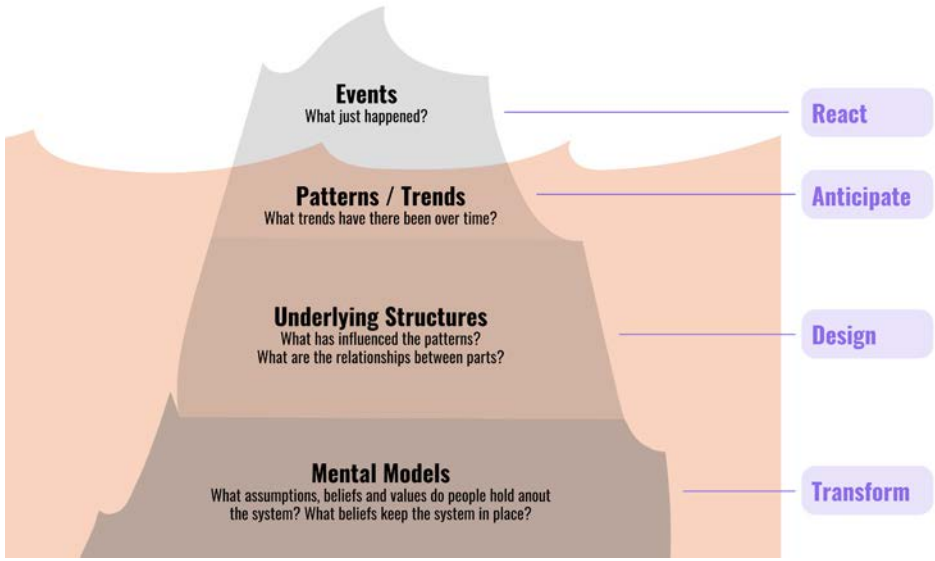


Figure 3. 9. System Thinking Iceberg Model

An interesting exercise is to apply the iceberg analysis to a timeline of events. In Part 1. Ecology of Social Movements and Transversal Organising, Module 2 there is an activity that involves making a social movement timeline. This involves drawing a timeline that marks key events in the life of a specific social movement, along with contextual events in society at large. By applying the iceberg to such a timeline we begin to ask what patterns we see emerging over time, what kind of underlying structures might account for these, as well as the mental models that combine with those structures, both shaping them and being shaped by them. To step up to the challenges of applying strategic thinking to the scale of developments relevant to movement building work, making this kind of analysis everyday good sense is essential.

Learning activities

Scenario planning

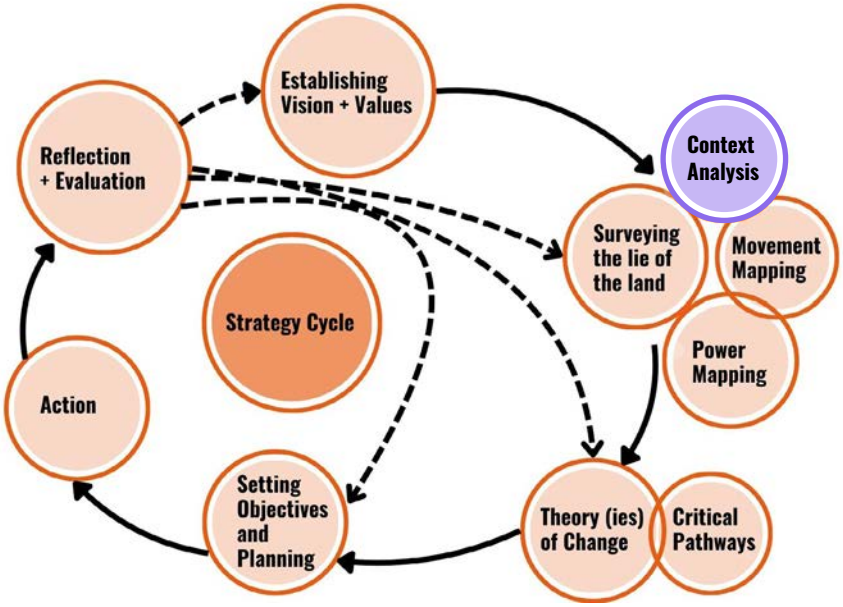
This activity supports participants to apply the scenario planning framework to context relevant to them. It should be closely facilitated and is a useful way for people to learn how to avoid some common pitfalls encountered using the method.

Systems Thinking Iceberg

This learning Activity introduces the Systems Thinking Iceberg (STI), a model for deep systemic analysis, revealing the underlying structures and mental models influencing events. It encourages activists to dissect complex systems, starting from observable events, identifying repeating patterns, and scrutinising root causes and underlying structures like policies and mental models. It invites the assessment of the influence of underlying structures and beliefs on organisational behaviours and informs effective interventions.

Learning resources

- Ecochallenge. Iceberg model, Learn about the theory and practice of Systems Thinking.
- Holmgren D. (2008). Future Scenarios: Mapping the Cultural Implications of Peak Oil and Climate Change. Website.
- Holmgren D. (2009). Future scenarios: how communities can adapt to peak oil and climate change. Chelsea Green Publishing.



MODULE 7. THEORIES OF CHANGE AND TRANSFORMATION

Introduction

With vision and values offering a sense of direction and informing our purpose, and having surveyed the lie of the land, we are now equipped to begin to look closely at the pathways that we believe will lead us towards the changes we want to see in the world. This module encourages us to examine our assumptions about how change happens, resist magical thinking, and be attentive to the ways our actions can genuinely combine towards real impact and transformation. We look at the distinction between overarching theories of transformation and the more granular theories of change that describe courses of action. Using the critical pathways tool, we develop good practices that ensure we are not simply repeating habitual tactics and that we are genuinely looking to ensure our efforts align with strategic ambition.

Learning aims

- Learn to expose our mental models about how change happens to the light of day, so they can be examined and tested
- Gain familiarity with the distinction between theories of transformation and theories of change, and how they inform each other
- Gain skills and methods for developing critical pathways that can ensure strategic alignment of our plans and actions

"Expose your mental models to the light of day"

This phrase is used by the systems scientist Donella Meadows in her posthumously published book *Thinking in Systems* (Meadows, 2015). In one of the chapters, she offers a set of guidelines for living in a world of systems and this adage is one of her recommendations. As activists we carry around constellations of assumptions about how our action connects with processes of social change. These are not always conscious or fully formed, and often when they are, they are ideas we've inherited or acquired through osmosis from the organising cultures within which we've worked. If we want to develop effective strategies, we need to expose and scrutinise our assumptions.

Figure 3. 10. Donatella Meadows (Source: Academy for Systems Change, CC BY-NC-ND 3.0)

Especially important are the views we carry about the role of social movements. Are the stories we tell ourselves about what movements actually do describe their role, and what is it? We have explored some of this in the curricula in *Part 1. Transversal Organizing and Ecology of Social Movements*, where we have tried to encourage a broad and complex understanding of social movements include a wide range of contributions and influences, including their ability to develop narrative, their power of disruption, their shaping of institutional transformation, and so on. And to inform strategy we need to think this through. Are movements just a way of "speaking truth" and flagging up problems? Is the role one of signalling popular concerns and power that legislators should pay attention to? Are there ways to build and take power, replacing elites and radically changing the game? We need to clarify for ourselves and the groups we work with how we understand social movements and their functions if we are going to strategise with them in mind. We also need to develop a sense of how social movements interact with other social or political actors and processes.

Theories of transformation and theories of change

Bringing attention to our understanding about how socio-political change happens requires that we distinguish between two levels of theory, each of which informs the other. On the one hand we have the overarching views we hold about historical processes, the factors and dynamics that contribute to large scale transformation. On the other hand are the theories we have about how specific strategic actions, objectives, and tactics can shift the conditions we work within and contribute to carrying us along pathways towards our longer term goals. We'll distinguish between these by using the term *theories of transformation* to refer to the first of these and *theories of change* to refer to the second.

Theories of Transformation

Theories of transformation articulate our understanding of large-scale historic change. In the modules in *Part 1. Transversal Organizing and Ecology of Social Movements* we've looked at some of these. We discussed three kinds of large-scale approaches associated with historical movements: 1) building alternatives inside the system or reform type approaches, both radical and social democratic, 2) building alternatives outside the system, as in the case of certain kinds of autonomous or anarchist organising, and 3) ruptural strategies, that seek to confront and dismantle the state in order to replace it with something else. We've also suggested that often these will be closely connected with our political vision and values, informed by our political affinities, which often shape how we think change should happen, but aren't always scrutinised in the face of how change does or has happened. It is useful to review and refine our beliefs through the kind of activities described in the *Part 1* curriculum related to learning from movement histories and movement mapping.

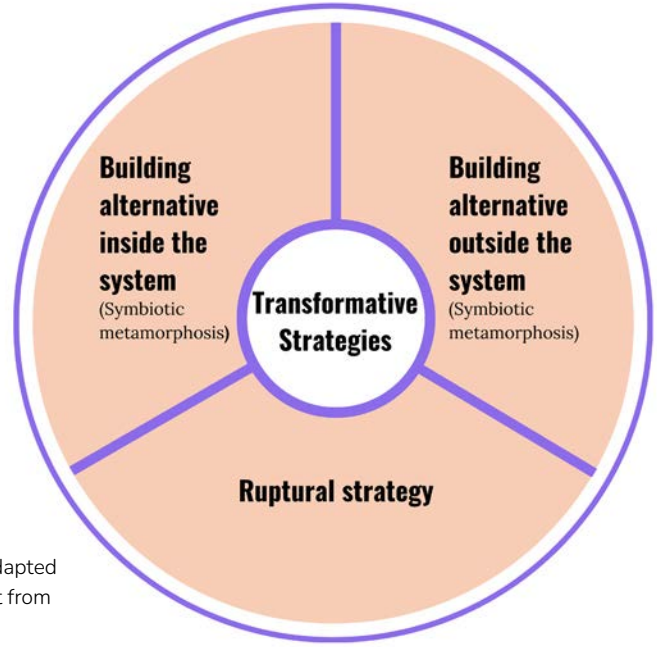


Figure 3. 11. Transformative Strategies - Adapted by Ulex project from Wright (2010)

It can also be valuable to examine the interplay of factors. We know that social change is complex, but what kind of forces and factors are at play? We need to think about the interplay of different factors and consider how these fit into our understanding.

How does change driven from the bottom up intersect with change shaped from the top down? The mobilisation and organisation of grassroots and communities interact with the institutional forces and the power held by elite groups. Sometimes this is shaped in terms of inside and outside games, the relationship between movements and parties or protestors and legislators, or the push and pull of building popular power and the resistance they encounter from the established systems of power.

How do shifts in consciousness and changes in material conditions inform each other? Economic and environmental conditions both drive change and create obstacles or opportunities, these interact with narratives, ideologies and culture. Both the material and the mindsets play crucial roles that we need to bring awareness to in our strategic thinking.

How do we understand the sudden and gradual dimensions of change? Often large-scale change erupts, seemingly out of nowhere, and yet the conditions for these sudden changes are often ripened over long periods of time. Tipping points are achieved, or external factors shift the context dramatically, making what seemed impossible suddenly inevitable.

What is the relationship between resisting oppression and building alternatives? Both play their part. Resistance is often the basis for engaging people in defence of their interests and values. But the building of alternatives is also necessary in order to create practices and new institutions capable of consolidating change in certain forms.

None of this is simple, and to develop our thinking about these things takes time, study, discussion, and debate. But doing so will not only improve our own thinking and capacity for strategic analysis, but it will also help us to build a shared understanding that can underpin our collaboration across organisations and networks.

As we mentioned when discussing the *Strategy Cycle*, the process it describes isn't simply linear. When we explore questions about how change happens we'll often find ourselves needing to review our work on surveying the lie of the land. We might become aware of factors that we haven't held in mind when engaging in context analysis or actors and constituencies we didn't consider when mapping movements or analysing power relations. This is inevitable and improving our ability to analyse and think strategically will inevitably be incremental and iterative.

Theories of change and critical pathways

Theories of change nest within our theories of transformation. They are more granular, which doesn't mean reaching the level of detailed plans, but does imply that they are more closely informed by the specific historical conditions we are working within, rather than just the bigger patterns of change articulated in our *theories of transformation*.

Our theories of change will provide a scaffold on which we can hang concrete objectives and around which we will build specific action plans. They enable us to bring our vision and values into relationship with the actually existing conditions, the strengths and weaknesses of our movements and organisations, and the opportunities and threats we see in the surrounding context. The theories of change explore how we build on these or take them into account in analysing a course of action. Where do we need to increase capacity? What opportunities should we target? How can we further weaken forces that block us? And so on.

Doing this is difficult and needs to be supported with concrete tools and practices. One of the most useful and practical ways we've encountered is the development of *critical pathways*. A *critical pathway* is simply a framework

of stepping stones, each one being a change that needs to happen, that lead towards our longer term goals. In the learning activities describe a specific tool that can help us to learn the discipline involved. Here we'll briefly discuss the principles the method aims to articulate.

Breaking out of tactical habits

One of the most common pitfalls that activists seem to fall into, and which undermines long term strategic capacity, is the habitual repetition of tactics. Our sense of urgency and feeling that "something needs to be done" will invariably drive us to rehash our previous efforts, unable to find the time or space to deeply analyse just how relevant or impactful those actions have been or will be.

A critical pathway describes the series of changes that need to happen in order for other changes to happen. By turning our attention away from asking "what shall we do?" towards "what changes need to happen?", it helps us to break out of habitual assumptions and tactical repetition. Once we have more clarity about the changes that need to happen we can then think more openly about what we need to do to achieve them.

Challenging magical thinking

Connected with tactical habits is the tendency towards magical thinking. Too often it seems that our actions are informed by the idea that "if we just do that again this time it will be different". When we need to really attend to thinking about what changes are needed to build towards the bigger changes we want to see we are forced to ask deep and sometimes difficult questions about the relevance and real possible impact of what we are doing or plan to do. This entire curriculum is obviously trying to help us avoid falling into unthinking habits, performative action, or such self-delusion. Developing critical pathways really bring this into focus.

With a critical pathway we can assess the extent to which any specific action or objective actually aligns with our overall goals and ambition. It helps us to evaluate whether one action or another helps us to move in the direction we need to move and whether they actually add up over time. It enables us to keep our attention on each step as part of a bigger process longer term series, rather than experiencing each action or campaign in isolation.

Multi-linearity and coordination

Critical pathways enable us to analyse complex processes. They are rarely unilinear and tend to involve multi-linear and simultaneous changes across different spheres or capabilities which can then combine and augment each other. They will help us to consider the multiplicity of action and contribution involved, much of which we will not ourselves be able to carry out, but which needs to happen in a distributed way across our movements.

Creating conditions: The approach helps us to focus on creating conditions rather than simply thinking in simplistic terms of cause and effect. We'll find ourselves more able to ask the question Paulo Freire posed: "What can we do now, so that tomorrow we will be able to do what we can't do today"?

Conditions beyond our control: Thinking in terms of changes that need to happen, rather than actions we will take, will also help us to consider changes that are beyond our control, but for which we might need to plan. It encourages us to recognize that large-scale social change rises from an interplay of multiple factors and conditions, helping us to avoid the pitfalls of thinking in overly deterministic ways that lead to delusive ambitions to control rather than influence outcomes.

Proximity, distance, and adaptation: Critical pathways help us to attend to both the long term and the immediate. They enable us to construct pathways that can contain a wealth of detail in the near future, but more general and broad

ideas of what is likely further into the future. This will help us with building agility and adaptability into our planning.

Basis for coherent planning: The pathways offer a clear framework of changes or outcomes, that are easily transformed into specific and concrete objectives and constitute a coherent basis for developing detailed work plans, that can be reviewed and adjusted in a way to support continuity of purpose.

Learning activities

The critical pathway framework

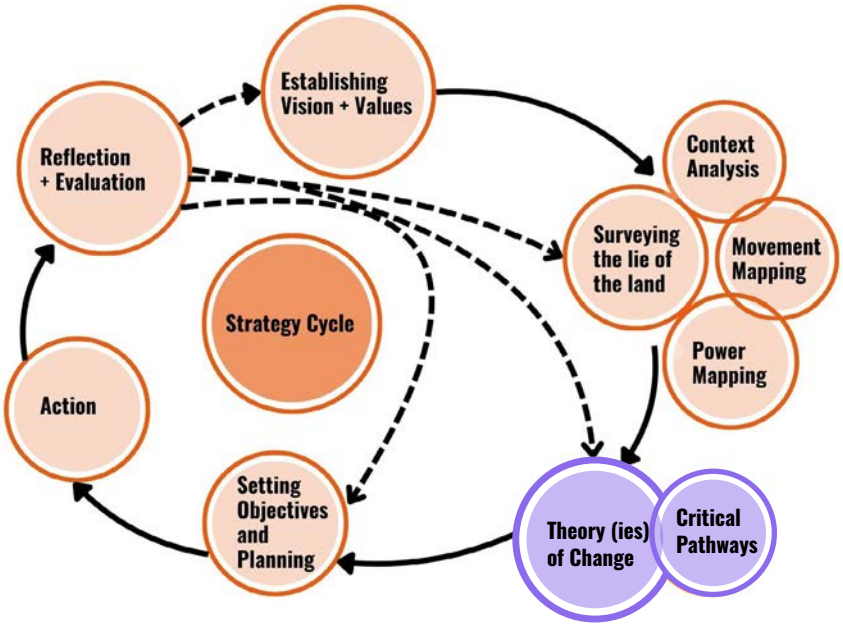
This activity breaks down the demanding and complex process of developing a theory of change into a clear set of steps. It enables us to synthesise the analysis and surveying we've done already, into a clear pathway of necessary changes in a way that challenges magical thinking and can help us to bear in mind the multiplicity of factors involved in making change. It can help us to develop a strategic discipline and break out of habitual tactical repetition, as well as providing a pathway that we can use to support strategic continuity and coherence to our actions. It provides the basis for setting specific objectives and then developing clear plans.

Theory of transformation spectrum lines

This learning activity aims to support group and personal reflection on our "theories of transformation", namely our views and beliefs about how change happens and the ways that our practice is informed by these beliefs.

Learning Resources

- Meadows, D. H., & Wright, D. (Eds.) (2015). Thinking in systems : a primer. Chelsea Green Publishing.
- Wright, E. O (2006). Towards a Socialist Alternative.



MODULE 8. STRATEGY AND COMPLEXITY 1

Introduction

Social change is a multifaceted process shaped by intricate interactions and unpredictable dynamics that cannot be influenced through simplistic, linear, and conventional strategic approaches alone. In this module, we explore the intricacies of social change in a world that is volatile, uncertain, complex, and ambiguous (VUCA). We will dive into key themes related to complexity with insights from the study of complex living systems theory. This will inspire critical reflections on how to take into account complexity to inform our approach to movement strategy, and on the skills and attitudes necessary for navigating complexity effectively.

Learning aims

- Reflect critically on the most common approaches to strategy and their limitations
- Explore the concept of complexity and why it matters to plan strategies for social change
- Identify the skillset required to strategizing in a world that is Volatile, Uncertain, Complex, and Ambiguous (VUCA)

Why complexity matters?

Our world is characterised by complexity and constant flux, further exacerbated by globalisation and technological advancements. Social change processes can be unpredictable and multifaceted, driven by a multiplicity of intersecting factors that defy straightforward predictions and analyses. This means that attempting to analyse and influence the causes of social problems and their solutions, using linear approaches is inevitably limited, will often fail, or lead to unintended consequences. If we want our action in the world to have impact, if we want it to contribute to significant structural transformation of society and ecological conditions, we'll need to be able to work and organise amidst change and complexity. This involves developing strategic approaches that acknowledge and adapt to the interconnected, transient and complex nature of the world we share. We will need to cultivate our personal capacity to face and navigate a world in constant flux, and endure the uncertainty that implies.

Figure 3. 12. Complexity cartoon, (Source: WeTheRoot, CC BY-NC-ND 3.0)

Linearity, reductionism, and mechanistic mindsets

Historically, socio-economic systems have been influenced by a reductionist and mechanistic paradigm, emphasising linear cause-and-effect relationships. These ways of seeing the world encourage us to reduce problems to their simplest parts and to think in terms of linear, unidirectional cause and effect. This approach can contribute to a belief that by reducing things to their simplest components we can develop strategies and approaches that enable us to determine and control the outcomes of our actions. This way of thinking also encourages us to believe in the objective and universal nature of knowledge, and the prioritisation of the measurable and quantifiable ahead of qualitative and more subjective aspects of life.

While this paradigm has facilitated significant scientific and technological progress, it inadequately explains complex living systems such as ecosystems, economies, and human societies. It has also underpinned the conceits of human superiority and domination that have been at the heart of the anthropocentric, progress obsessed trajectory that leaves us colliding with non-negotiable ecological limits. Attempting to apply mechanistic principles to social change efforts overlooks the nuanced interplay of factors and the inherent unpredictability of complex systems, which are far more complex, irreducible, and unpredictable than the mechanistic paradigm is able to explain or control.

Whether we are trying to influence large scale socio-political change or strategic shifts within our own organisations, using linear and reductive approaches expecting to be able to determine and control outcomes through simplistically conceived interventions, is likely to fail and be frustrating. So, how can we better strategise and organise amidst complexity?

Different types of problems

It can be useful to recognise that there are different types of problems and that they require different kinds of approaches. Let's say that problems can be simple, complicated, or complex.

Simple problems (such as baking a cake) involve solutions that are relatively easy to do and can be addressed by re-creating proven conditions often by ourselves, with little risk of failure. Complicated problems (like building a rocket) are more difficult to solve. They can involve a lot of analysis, testing, and gathering expertise, often needing to involve the right team with appropriate skills and expertise. These are difficult, but doable. Complex problems, however, don't have a "right answer". Raising a child, for example, is not something that we can know how to do in advance, or simply by bringing together an expert team. However much prior knowledge and experience we bring to the situation, a great deal remains unknown and unpredictable. And the cause and effect is never linear or unidirectional in the sense that parenting will be mutually conditioning. As the child develops, so too does the parent through the act of parenting. So, we need to take an approach that is iterative, responsive, and evolving over time.

Simple Like baking a cake	**Complicated** Like making a rocket	**Complex** Like raising a child
Easy to do. Re-creating the proven. Low risk of failure. Can do it myself.	Difficult to do. Improving what works. Risks are many & managed. The right team can do it.	Iterative, Ambiguous risk not easily managed The village is needed Relationships are key
Known (Easy. I can do this)	**Knowable** (Difficult but doable)	**Unknowable** (No "right" answer)

Figure 3. 13. Simple, Complicated and Complex Problems, adapted from Glouberman & Zimmerman (2002)

With simple problems the solutions are known. For complicated problems the solution is knowable. But for complex problems the solutions are, in a sense, unknowable. As it has been said in the world of ecology: "It's not that ecosystems are more complex than you think they are, it is that ecosystems are more complex than you can think!"

The recognition of the nature of complex systems suggests humility and a re-evaluation of our assumptions about being able to control outcomes in complex processes. But it doesn't mean that we need to fall into complacency or negate all sense of agency. While a caregiver might not be able to determine the personality and character of a growing child, they can certainly exert an important and valuable contribution to a child's development. And in some ways, by letting go of the conceit or need to control, the outcomes are likely to be far more positive! Similarly, acknowledging the limits, nonlinearity, and complexity in the relationship between our agency and social change, needn't lead to complacency or a sense of futility. In fact, by integrating such understanding, our efforts can become far more effective. But to do so implies a significant shift in how we think and see the world, and the development of different skills and approaches. These are what we call VUCA skillsets.

Skills to navigate Volatility, Uncertainty, Complexity, and Ambiguity (VUCA)

The acronym VUCA - Volatility, Uncertainty, Complexity, and Ambiguity— was was coined by military strategists in the 1980's in an attempt to describe the characteristics of the world they within which they found themselves operating and to help to improve their ability to respond to those conditions strategically. Despite these origins, the concepts can help to shed light on the challenges we face strategizing in the context of social transformation. VUCA stands for:

What is VUCA?

- **Volatility:** Things change, often constantly and sometimes very quickly.
- **Uncertainty:** It is difficult, if not impossible, to accurately predict what will happen next.
- **Complexity:** As they say in the world of ecology, "it's not just that ecosystems are more complex than you think they are, it is that they are more complex than you can think".
- **Ambiguity:** Even though we might have large amounts of information and data about things, what it actually means or implies can often be less than clear!

For those interested in influencing social change in a VUCA world, it is important to develop a VUCA skillset. The skillset involves a set of knowledge, skills, and attitudes (in the table) which involve embracing humility, flexibility, and resilience in the face of uncertainty. It entails shifting from traditional knowledge and attitudes towards more nuanced understandings and adaptive practices. Here are the key knowledge, attitudes, and skills of the VUCA skillset:

Knowledge: Recognise the mindsets we carry and develop more nuanced and useful ways of seeing, drawing learning from the study of complex living systems, ecology, and systems thinking.

Attitudes: Develop the emotional capacity to sit with uncertainty, live with impermanence, willingness to take and manage risks, greater mental humility, and flexibility. It can involve being able to appropriately balance receptivity and patience to learn from experience with the passion and drive needed to test things out.

Skills: Acquire and practice tools to think and plan strategically, develop responsive designs for action, and shift from expectations and cultures of control to collaboration.

In summary, social change occurs within a complex and dynamic landscape which presents the characteristics of living systems. To navigate this complexity, activists and organisers need to develop VUCA skills, move beyond mechanistic mindsets, and embrace holistic approaches informed by complexity theory and living systems theory. This means by shifting our perspective from focusing solely on individual parts, to recognizing the interconnectedness and emergent properties of the whole, in order to develop strategies to influence systemic change that are responsive and adaptive to the ever-changing context.

Learning activities

Systems Game

This activity is a movement based activity that sets up an experiential activity that can then be used to explore the dynamics of a complex system. It is a versatile activity that can be used as a quick icebreaker or extend for an hour or more depending on the context.

The chair game

This is a game that almost always hooks the participants into wanting to play again and again! It sets up a simple group challenge that requires analysis of a complex system, issues concerning coordination and communication. An excellent framework for deep discussion about complexity, cooperation, and strategy.

Learning resources

- Glouberman, S. & Zimmerman, B. (2002). Complicated and Complex Systems: What Would Successful Reform of Medicare Look Like?. *Commission on the Future of Health Care in Canada: Discussion Paper No. 8. 8.*
- Maani K. E. & Cavana, R. Y. (2007). *Systems thinking, system dynamics : managing change and complexity.* Pearson Education Canada.

MODULE 9. STRATEGY AND COMPLEXITY 2

Introduction

Building upon the concepts introduced in the previous module, here we close the sub-curriculum by exploring a few key principles and their relevance for strategising in the context of social movements and ambitions to influence structural socio-political transformation.

Learning aims

- Deepen insights into learning from the study of complex living systems
- Describe the characteristics of complex living systems and implications for using a living systems approach to influence social change
- Identify guiding principles derived from these studies and their relevance to strategising for social change
- Gain familiarity with tools and practices that apply these principles

Understanding social change as a complex living system

As mentioned in the previous module, social change processes exhibit the characteristics of complex living systems which cannot be reduced to linear unidirectional cause-and-effect relationships. Since the advent of the modern scientific paradigm, there has been an ongoing struggle to effectively apply scientific principles to living systems. This challenge has prompted a diverse array of scientists and thinkers across disciplines such as organicist biology, quantum physics, gestalt psychology, ecology, complexity theory, and organisational theory to explore the behavioural dynamics of living systems, collectively known as a holistic scientific paradigm.

Modern Science	Holistic Science
The Parts	The Whole
Objects	Relationships
Hierarchies	Networks
Universal Truths	Approximate descriptions
Objective Knowledge	Contextual Knowledge

Figure 3. 14. From modern to holistic science: Experiences of systemic change, adapted by Maria Llanos (2024) from Schumacher College.

At the heart of the holistic science paradigm lie several key principles that define complex living systems:

1. **Interdependent relationships:** Complex living systems are characterised by interdependence among their constituent parts. Rather than focusing solely on individual components, we need to shift our focus of attention to the intricate web of relationships that shape the behaviour of the whole system. These are interdependent relationships, meaning that there is a mutual reliance amongst the parts. Parts change and affect each other through feedback loops of information. These constant interactions create a sustained state of coevolution, self-regulation, and adaptation.
2. **Emergent properties:** One of the most intriguing aspects of complex living systems is the emergence of properties that cannot be predicted from the behaviour of individual parts alone. These emergent properties are not additive or cumulative and they represent new qualities of the whole that arise from the interactions among system components. They illustrate that the whole is indeed greater than the sum of its parts. A classic example is the quality of water, none of its components, hydrogen or oxygen, possess that liquid quality, but in their interaction, water appears as an emergent property of the whole. Other examples are the starlings murmurations, consciousness, ant colonies, a melody, collective intelligence, organisational/movement culture.

3. **Feedback loops:** Information flows through feedback loops within complex living systems, facilitating constant interaction and adaptation among their components. These feedback mechanisms play a crucial role in maintaining system stability and responsiveness to internal and external changes.
4. **Coevolution:** Living systems are in a perpetual state of coevolution, continuously adapting and evolving in response to their environment and to each other through sharing information and influence. The capacity to self-regulate and balance after disruptions is enabled by their capacity for adaptation.
5. **Self-regulation:** Despite their complexity, living systems possess a remarkable capacity for self-regulation. They seek stability and adaptability through internal mechanisms that enable them to maintain balance and respond effectively to disturbances.
6. **Diversity and resilience:** Diversity within living systems enhances their resilience, allowing them to withstand disruptions and maintain functionality. Systems with greater diversity are better equipped to navigate changes and recover from disturbances.
7. **Non-linear causation:** Causality within complex living systems is non-linear, meaning that relationships between cause and effect are not straightforward. This non-linear causation contributes to the unpredictable nature of living systems.
8. **Contextual knowing:** Understanding living systems requires a contextual and partial form of knowing, transcending purely rational or reductionist approaches. It involves embracing intuition, feelings, sensations, and imagination as essential aspects of comprehension.

Living systems move in a delicate balance between chaos and order searching for self-regulation and adaptation. Too much complexity can lead to paralysis or chaos, while too little can result in stagnation. Moreover, the level of complexity within a system influences its volatility, with rapid and unpredictable changes occurring in highly interconnected systems.

It is crucial to recognize that complex living systems encompass a wide range of phenomena, including forests, climate patterns, economic systems, organisations, social movements, and social change itself. In navigating such complex contexts characterised by volatility, uncertainty, complexity, and ambiguity (VUCA), the challenge lies in devising strategies and actions that effectively engage with the inherent dynamics of complex living systems.

Figure 3. 15. Natural pattern “Drops of web” (Source: Ben Collins, CC BY 2.0).

Understanding complex living systems requires a shift in perspective from focusing solely on individual parts to recognizing the interconnectedness and emergent properties of the whole. By embracing the principles of interdependence, emergence, feedback, coevolution, self-regulation, diversity, non-linear causation, and contextual knowing, activists and organisers can better navigate the complexities of the world and influence change effectively.

Guiding principles for strategizing

Drawing from insights from the study of complex living systems, the following principles can help us to design more effective approaches to strategy. Each principle is accompanied by learning resources available at the end of the module.

1. Create supportive conditions and environments

This principle emphasises the importance of fostering conditions rather than focusing only on concrete outcomes. This shift allows for flexibility and adaptation, acknowledges uncertainty. The focus is in creating conditions for change. It is important to learn to see patterns, to map relationships. Tools to apply this principle include relational mapping and systems thinking iceberg, which facilitates pattern recognition. This approach also enables us to take more account of non-linear processes in which causal assumptions drive our prioritisation. Attending to the cultivation of supportive conditions will support strategic development that remains responsive and better able to take account of longer term and non-direct forms of influence.

2. Gather points of view

This principle points out that collaboration among diverse actors and gathering different points of views are ways to enhance our understanding of the system and propose systemic solutions together. As difficult as it may be for social movements to come together and develop a collective analysis of the system and a co-created strategy, it would be a way to develop strategic thinking at a movement level. Tools to apply this principle include Participatory Action Research (PAR), actors mapping, network analysis, and movement timelines to identify strategic needs and opportunities within the ecosystem and how we could contribute.

3. Focus on multiple sizeable strategies

This principle refers to planning and adopting strategies that address both gradual changes (ripple effects) and abrupt qualitative shifts (qualitative jumps), at micro and macro levels. Tools to apply this principle include scenario planning and flowcharts which could help discern possible actions taking into consideration ambiguity and uncertainty.

4. Create feedback loops of information for learning

This principle focuses on cultivating continuous learning through iterative processes and adaptive mechanisms. Create learning infrastructures and conditions for iterative, agile learning and adaptation in our organisations and movements. These include learning cultures that put learning from our experience at the centre and embraces reflection on experience, enquiry, creativity and safe risk taking. When done correctly, reflection on experience and feedback loops of learning can ameliorate our actions and increase our personal and organisational capacity. Tools to apply this principle include agile methodologies (to respond to unpredictability through incremental, iterative processes and short feedback loops), and tools for experience-based learning. (More details on the importance of experience-based learning can be found in *Part 4. Movement Learning and Popular Education* of the Movement Learning Catalyst).

Figure 3. 16. Kolb's learning cycle, adapted from Kolb (1984)

5. Attending to our attitudes and mindsets

This principle outlines the knowledge, skills and attitudes for strategizing well in the face of the VUCA world, from the individual to the organisational level. Some of these include: cultivating responsiveness, process orientation, and ego awareness to navigate complex and uncertain environments effectively. Visionary thinking and creative cultivation facilitate adaptation and resilience. Holding expectations loosely fosters openness to new information and promotes genuine participation and creativity.

Being responsive: Developing capacity to be present, listen, accept, and respond to changing circumstances and maintaining emotional centredness and commitment while balancing openness and groundedness.

- Value process: Culture often prioritizes results over process. Process-oriented work helps understand underlying dynamics and interprets patterns.
- Working consciously with ego: Working with our ego, overcoming command and control approaches, and being comfortable with not knowing, tapping into collective intelligence and creating conditions for people to contribute and participate.
- Be visionary and creative: Cultivating the capacity to generate vision is fundamental for guiding ourselves and others through uncertainty. Visionary capacity requires conscious cultivation.
- Learning to hold views more loosely: Enhance our responsiveness by learning to hold expectations and views more loosely and remain open to the flow of information and proposals that are created through the interactions with other people. Being mindful of balancing openness with awareness of risks like disinterest or emotional detachment. This enables true participation and creativity by allowing us not to react emotionally when something does not turn out as we expected, but to accept the new situation and re-create a response suited to the situation.

Learning activities

Relational mapping

This learning activity guides activists through developing relational movement maps to understand network dynamics. It introduces network theory concepts such as density, centrality, homophily, and multiplexity. Participants reflect on patterns of connections, strengths, and weaknesses in their networks, identifying key actors, roles, and potential improvements for enhanced cooperation and influence.

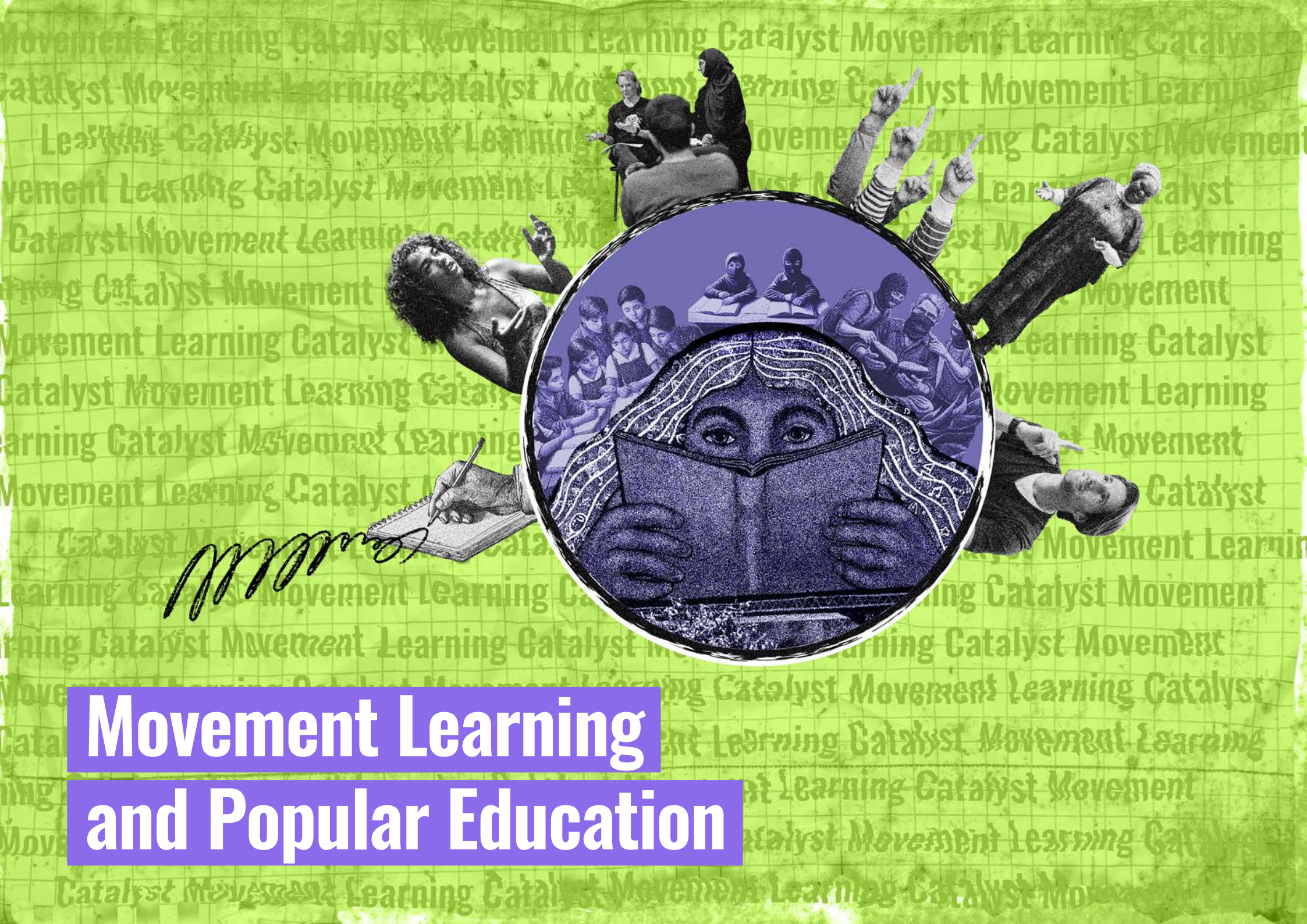
Practising awareness for complexity

Practising awareness for complexity is a series of 5 sessions of 1 hour each. Practising awareness is a way to strengthen the muscle to see more fully. Seeing within – a light into the formation of our perception and meaning making, into our assumptions, patterns, habits, history. And seeing out - into the essence of other people's experience and the complexities of social phenomena. Running these sessions requires experience with facilitating meditation, Social Presencing Theatre and understanding of complex living systems principles.

Learning resources

- Bohm, D. (2014). *On dialogue*. Routledge Great Minds.
- Brown, M. (2017). Emergent strategy: shaping change, changing worlds. AK Press.
- Kolb, D.A. (1984) *Experiential Learning: Experience as the Source of Learning and Development*. Upper Saddle River, Prentice Hall.
- Gunderson L. H. & Holling C. S. (2012). *Panarchy: understanding transformations in human and natural systems*. Island Press.
- Mindtools. *Flowcharts: Identify and Communicate Your Optimal Process*.
- Movement Generation. *Shocks, Slides, and Shifts*. Website.

To learn more about the Movement Learning Catalyst learning resources, visit www.movementlearning.org



Movement Learning and Popular Education

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Credits

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PART 4
MOVEMENT LEARNING AND POPULAR EDUCATION

INTRODUCTION

An important, and in many respects a defining characteristic of movements is that they produce knowledge, ideas and symbols, in order to change things. Every movement elaborates its own particular way of making sense of the world. It does this by developing a repertoire of organising practices, articulating visions of a more just world, making arguments for certain values and offering compelling explanations of how things work and might work. Powerful movements become powerful by orienting how we feel, think, and act. We learn through movements to rethink the ways in which we make claims, understand our own needs, and how we relate to each other. These observations are necessarily broad but the processes we are describing become clearer when we consider them historically and think about the development of, say, the workers, feminist or ecological movements. Once you pause to think about this collective sense-making – the way movements move – you realise it depends on rich and layered learning processes both "inside" the movement and "outside" in the public sphere.

Yet this fact is given relatively little attention in public discourse and academic research or, much more importantly, within movements themselves. Have a look through some of the movement media you regularly read, watch or listen to and see what you find when you search for articles, videos and podcasts on learning and education. We imagine you will discover a decent amount of material about the role of education in society, on educational struggles such as teachers strikes and student fees, as well as pieces about challenging and changing the curriculum in public institutions. But we anticipate you will find a scant amount of publications and other resources dealing with movement learning and education. Education in public institutions, quite rightly, is seen as a significant site of struggle between hegemonic and counterhegemonic movements. However, we spend far less time considering our experience of activist learning or discussing the role of learning and education in building and sustaining movements.

The working assumption behind this way of focusing on things seems to be that activist learning occurs as a matter of course, and new forms of movement education will emerge as struggles intensify and deepen. This is not incorrect, but is it sufficient? We do not think so. In the Movement Learning Catalyst (MLC) we are convinced that we should deliberate more carefully on these matters and reflect on our learning needs and desires as activists. We should be explicit about the knowledge, skills, and capacities we need to develop to effect transformative social change. We should also know what we have already learnt in order to avoid repeating mistakes, and getting stuck at the same (or even degenerating) level of strategic and mobilising capacity. It is all too easy to end up in cycles of repetitive, inward-looking activism that burn people out and fail to make an impact.

Movement education is not a "silver bullet" for movement building or movement victories, but assessing what we are doing well already and also looking at what is less advanced or absent altogether in terms of movement learning is necessary to building more sustainable, effective, and reflexive movements. It is worth remembering that neoliberal and conservatives movements from above, and pseudo anti-systemic movements on the far-right, are all actively and successfully rolling out education programmes and supporting activist learning.

Thus the main aim of this part is to bring movement learning and education fully into view and to offer activists concepts, activities, and resources which help

us name what we do and what we want to do in terms of movement education. This part has three key foci: 1) reflective discussion of the key dimensions of movement learning; 2) outlining some of the history, principles and practices of radical popular education; 3) reflecting on how learning and education can be used in contemporary activism. As part of this we also consider how to capture and build upon social movement knowledge through various means.

Learning aims

- Bring movement learning and education into view as important aspects of activism
- Develop a language for identifying key dimensions of learning
- Critically reflect on learning in activism
- Heighten awareness of theory and practices of radical popular education and complementary ideas
- Support the embedding and enhancement of effective learning in organisations and movements, including knowledge production and dissemination

This part comprises five modules. The first module asks people to reflect on their lived experience of learning. The second module draws on research about movement learning. We will look at the forms this typically takes, the learning and education that takes place in our organisations and movements. The third and fourth explore various aspects of radical popular education. The final module draws the various strands together and asks how we can best build on movement learning to identify the ways in which effective movement learning can be sustained or enhanced.

Considerations for educators

Educators do not have to follow the sequence of the modules above in a linear way or cover all of the modules, but it is worth saying there is a clear pedagogical arc behind organising the modules in this particular order. It builds out from participants' experience towards research on movement learning and the ideas and practices of popular education. Moving between experience and bodies of knowledge and practices requires background reading and some skill in eliciting questions and analysing group themes.

When using this curriculum, it is important to consider that activists will be able to relate to questions about their own learning experience quite readily. They can remember that experience, that teacher or mentor, that set them on the activist path they are on. However, the idea of collective and movement learning can sometimes be a bit more challenging because it is more abstract – and it pushes against the way we are accustomed to think about learning and education. Delving into this requires background knowledge on movements and learning theory. In Module 2 and 4 we offer a framework for analysing learning and education, and if read in conjunction with Part 5. Notes on Pedagogy, provides a basis for doing this.

This part of the publication consists of activities that largely revolve around popular education, especially Freirean ideas. Please note that the various modules here are not "units" with a similar weighting. As such, Module 4 is especially important. The more nuanced, theoretical and practical aspects of popular education take a little bit of reading to grasp, and often people will not have the time or space to do this. If the trainers and educators are new to learning and popular education, many of the learning activities will be difficult to facilitate effectively and will need to be substantially altered.

The only other real challenge is finding a way of balancing inspiration with realism in using these materials and activities. It's clear to us that learning is important and that popular education has done some extraordinary things. At the same time, vibrant movement learning and well rooted popular education does not lead to movement success on its own. Exploring what is and might be possible can be tricky.

MODULE 1: DIGGING WHERE YOU STAND: EXPLORING EXPERIENCES OF ACTIVIST LEARNING

Introduction

In the Movement Learning Catalyst (MLC) we think it is crucial to build on, and from, participants' experience. We explain the rationale for this, and how we understand experience, in detail elsewhere in this publication (see *Notes on Pedagogy: An Educators' Guide to Using the Movement Learning Catalyst Resources*). In this module we wish to illustrate how building on, and from, experience can be approached and practically linked to the themes of learning and education. In support of this we outline how we understand learning, experience, and critical reflection. These comments in this module serve as framing arguments for all of the five modules in this part.

The learning activities below invite participants to reflect carefully on their learning experience as activists. The intention is to effect a pause and defamiliarize the familiar – after all, learning is ubiquitous, taken for granted, and an often unremarkable human activity. We use reflective biographical learning and phenomenological exercises with a particular interest in encouraging careful observation of patterns and shifts in activist learning. This is used as an entry point into questions of learning and education more generally, as well as to map the capacities, interests, and questions in the learning group.

Learning aims

- Reflect carefully on activist learning
- Recognize the value and richness of existing knowledge and capacities of group members
- Tap into the curiosities and puzzles of the group about movement learning and education
- Enhance participants' awareness of some of the dimensions of learning and of the process of critical reflection

Pedagogical challenges

The various learning activities described below are accessible and easy to adapt for use with diverse groups. Occasionally you may encounter some resistance to experiential learning activities because they are not viewed as "proper learning" or even as time wasting. In that case, the most productive response is to treat this as a welcome opportunity to explore questions of knowledge, learning, and power and what we value, or don't value, in education and activism. The importance of experiential knowledge must be genuinely felt by the educator to work productively with such resistance.

Reflecting on emergent themes in specific groups requires time and some analytical capacity. If this is new to you, it is best to pair up with a more experienced educator to do this work. The most pedagogically difficult and demanding aspect of this module is thinking about how specific learning experiences, participant themes, and questions link, or not. Managing this is the key to ensuring that the modules as a whole are approached in a coherent and critical way.

Related to this, you need to be able to conceptualise learning and education in an informed and cohesive fashion. We have found that when this clarity is not

there it can lead to flabby and somewhat directionless discussion. This is also why we offer a summary of how we theorise learning below. This is brief but dense, and it is there for you to clarify your own ideas and adapt as a working set of assumptions as an educator. It is offered as a shortcut and would advise doing some wider reading on learning and education if you can. If you want a general overview of learning theory Knud Illeris' How We Learn (Illeris, 2007) is comprehensive and relatively accessible for an academic text. Although it is not focussed on movement learning and education, it is a critical, comprehensive, and useful introduction to learning theory.

If you are at an early stage in the process of working out how you understand learning and education and these notes do not work for you, we would suggest that you make learning about learning and education a joint exploration and adapt the activities so they are more tightly defined and simpler.

Notes on learning

Learning is a slippery term used in very different ways in everyday, policy, and academic contexts. In part this is because so much attention is given to learning – there are oceans of text and innumerable online videos on this topic. Most of what is said about learning generally is irrelevant in the context of working with experienced activists because it is not oriented to questions of social change and/or it tends to treat learning as something that primarily, or even exclusively, occurs on an individual level. The simple fact that two of the major sources of thinking about learning – educational studies and psychology – are overwhelmingly apolitical and hampered by a deep commitment to methodological individualism is worth bearing in mind when preparing and planning sessions on learning and education with activists.

Learning does have to be theorised though. The fact that learning is discussed so often as well as in such diverse ways, and that it is something so routine and ordinary, makes it tricky to grasp or shape learning with any precision. It is a word that can suggest both everything and nothing. How you as an educator conceptualise learning has a strong bearing on the way the learning activities are held. How participants conceptualise learning will also influence how they engage with the module themes.

We broadly work within the popular education tradition, and based on this and the work of other learning theorists[4], we want to offer basic propositions which might be useful in clearing some ground. These are the following:

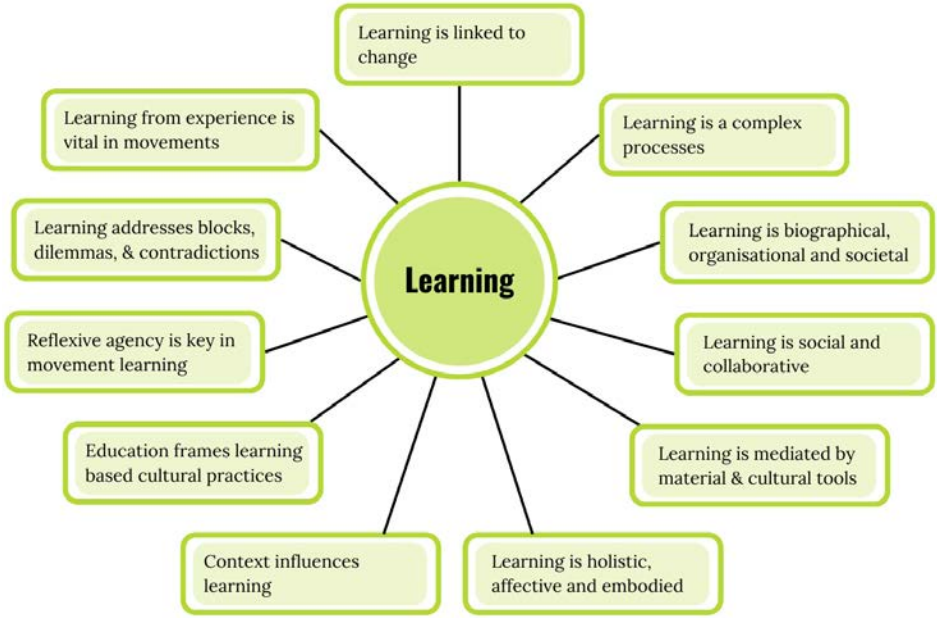

Figure 4. 1. Propositions about learning by Fergal Finnegan (2024) based on different learning theorists

4. It is not helpful to offer a cluttered, heavily referenced account of learning in a module such as this but we do need to be explicit about the sources for our notes here. It draws on Gregory Bateson. Jack Mezirow, Patricia Cranton, Griff Foley, Oskar Negt, Danny Wildemeersch, Klaus Holzkamp, John Holst, Elizabeth Lange, Michael Newman, Peter Alheit, Bettina Dausien, Rahel Jaegge, Barbara Merrill, Antonio Gramsci, Raymond Williams, Jean Lave, Etienne Wenger, Lev Vygotsky, Phyllis Cunningham, and Yrjo Engëstrom.

1. **Learning is a basic socio-biological capacity linked to change.** One way of thinking about this capacity that we find useful is as a type of basic curiosity linked to monitoring and responding to the environment.

2. **Learning takes multiple forms and involves diverse, layered, complex processes.** To name two important dimensions of this, the changes that occur through learning can be unconscious or conscious, they can be adaptive or transformative.

3. **In thinking about these complex processes, it is helpful to consider learning as something that can be grasped and explored on biographical, organisational and societal terms.** These are interconnected but analytically distinct "levels" which allow us to distinguish between individual and collective actors and the scope and scale of learning processes that are under consideration.

4. **Learning is primarily social and collaborative, while this idea may seem obvious, it is often overlooked.** Focusing on collective learning processes is crucial for making sense of movement learning and education. However, due consideration should be given to the personal, subjective processes within collective processes and attention to how a person biographically negotiates meaning within and outside movements is a prerequisite for effective pedagogy.[5]

5. **Learning is always mediated by material and cultural tools of various sorts (technologies, cultural codes, ideologies).** Theories of learning and pedagogy are tools of sorts.

6. **Learning is holistic, affective and embodied.** Each of the senses are mediated by cultural and material tools which extend, and even reconfigure, embodied cognition.

7. **Context – the specific group, institution, community – profoundly influences learning.** One important aspect of context is the extent to which learning is consciously fostered and organised, or not. A common way of marking this is to distinguish between formal, informal, and non-formal learning. Formal and non-formal learning are structured and systematic while informal learning is what occurs through everyday interaction and activities.

8. **Education is a type of context which entails a specific way of delimiting and framing learning based on a selection of cultural practices.** We are socialised to think about knowledge in specific, and often one-sided ways through education. This socialisation can block higher forms of learning including in movements.

9. **Distinguishing between types and depth of learning is necessary for planning and evaluating movement education.** For example, we can discriminate between instrumental, interpretive and critical types of learning. In any given learning circumstance these types of learning are combined. With regard to depth, we would point to two related things: the depth of reflection and the extent to which agency is enhanced. Fostering reflexive agency is, we think, key in movement learning and education.

10. **Deep forms of critical learning often begin by recognizing and responding to blocks, dilemmas, and contradictions.** It often involves critical reflection on assumptions which can result in unlearning and even transformative learning.

11. **Learning from experience is a vital element in movement learning and education.**

The remarks above are best read in conjunction with *Notes on Pedagogy: An Educators' Guide to Using the Movement Learning Catalyst Resources* in this publication.

5. The importance given to the personal and subjective aspects of learning differs across cultures but in the context of the MLC this has been indispensable, and our wider experience suggests this is generally the case in European educational and activist contexts.

Learning from experience and critical reflection

We discuss experience elsewhere and noted its centrality to how we approach education (See *Notes on Pedagogy: An Educators' Guide to Using the Movement Learning Catalyst Resources*). There we said we view experience in dialectical terms as biographical *and* social, it is personal *and* political, it has conscious *and* unconscious dimensions. It is also dynamic and always in the process of being actively reproduced or transformed in the present. We also noted that tapping into experience indicates where there is existing capacity in a group, and also where there are potentially generative blocks, tensions, dilemmas and contradictions.

We now want to add a couple of supplementary remarks here and note the value of resources outside of popular education. Reflexive practice is a way to become more aware of filters, and observation exercises are good tools to stretch and train our awareness. Phenomenology, pragmatism, and systems thinking are useful traditions of thought and practice in sense-making, and critical reflection on experience, especially when we are trying to learn from and about complex experiences where different actors and factors are at play. We are also interested in work which has built entire curricula out of experience put forward by the Swiss adult educator Pierre Dominicé and others. This can be done through writing, discussion, and other forms of artistic exploration, which all support critical reflection. The learning activities below are all designed to elicit detailed accounts of experience of learning. The key thing is that activities create modes of immersion, pause, and reflection. The content generated through this and the practice of critical reflection run through all the remaining four modules that cover thematic content.

Learning activities

Observing shifts in your learning as an activist

This activity invites participants to reflect on shifts in their practice through reflective writing followed by an exploratory walk and pair discussion. The activity concludes with a group discussion.

Plant observation

Here participants are asked to undertake a structured, careful observation of a plant. This is followed by discussion. The aim is to encourage exploration of experience and to think about how we make sense of the world.

Person observation

This has a similar focus to the preceding activity and involves structured, careful observation of others and relationality. This is followed by discussion. The aim is to encourage exploration of experience and to think about how we make sense of the world.

Learning from our lives

This outlines how biographical writing and presentation of biographical writing in small groups followed by small group discussion can be used to reflect on activism. This activity can be used on a one-off basis or extended over the duration of a course.

Harvesting questions, identifying needs, mapping capacities, generating themes

We describe a couple of the many ways you can identify the live questions and needs in a group. It also explains how the work of mapping capacities and generating themes can be done when looking at learning and education.

Learning resources

- Brookfield Stephen's website - a major writer in adult education - includes content on critical reflection with links to videos and class activities. A lot of the material is free.
- Dominicé, P. (2000). *Learning from our Lives*. Jossey Bass.
- Gergen, K. (2009). *An invitation to Social Construction*. Sage.
- Illeris, K. (2007). *How We Learn*. Routledge.
- Infed.org is a website with short good quality introductory texts on adult learning.
- Kaplan, A., & Davidoff, S. (2014). *A delicate activism : a radical approach to change*. Proteus Initiative.
- Kolb, D. (2014). *Experiential Learning. Experience as the source of learning. Prentice-Hall.*
- Mezirow, J. (1991). *Transformative Dimensions of Adult Learning*. Jossey-Bass.
- Schön, D. (1997). *The Reflective Practitioner. How professionals think in action*. Ashgate.

MODULE 2: MOVEMENT LEARNING

Introduction

Drawing on adult education and social movement research, this module outlines a number of key conceptual distinctions which are salient to understanding and planning social movement learning. We suggest there is a need to pay attention to movement learning as a phenomenon which operates on three interconnected "levels" – the biographical, the organisational, and the societal. Research on movement learning indicates a great deal of movement learning is non-formal, incidental, and routine. Bearing this in mind throughout the module, we invite participants to pause and think about the learning in their movements; the range and the richness of this learning and what works well and what might need to be enhanced or further developed. We also explore types of learning and the depth of learning that takes place through activism. We link this to a reflection on learning at different points in the waves and cycles of movement activity as well as across movements. Building on the questions and interests raised from all of these inquiries, the module concludes by asking what types of learning might be especially powerful or necessary in participants' contexts and how this can be fostered through education.

Learning aims

- Notice and celebrate the richness of activist learning
- Explore what is typically learnt in the participants' activist groups and wider movement
- Identify various dimensions of activist learning (levels, contexts, types and depth)
- Bring into view the full range and extent of learning as well as some of the conflict and tensions that arise in these processes
- Name what might be especially important and identify gaps in this learning

Pedagogical challenges

Module 1 highlights personal learning experience and seeks patterns in the experiences and interests of the group. Now we are moving towards a broader, layered account of learning at different "levels" – the biographical, the organisational and the societal – with an eye on contexts, types, depth, and tensions and gaps in learning. Pedagogically this requires a historically grounded understanding of movements and bringing some "sociological imagination" to the framing of the activities and discussions. This way of thinking is unevenly distributed across movements and cultural milieus. This means some of the learning activities initially may or may not make automatic sense to some participants. Ideally this can be done by drawing on the knowledge of some of the group members. This may not always be possible and below we outline some key ideas and possible resources that educators can use to prepare for this module. Regardless of the source of this "leavening", educators will need to have a good working knowledge of more than one social movement as they have developed over time as well as a clearly conceptualised approach to learning and education. The first two modules intentionally open up a very broad space for questions and this preparation and background understanding is what ensures that this is purposeful.

Levels of movement learning

Movement learning occurs on multiple levels and scales. It involves, as noted in Part 2. Transnational and Translocal Organising in this publication, a wide range of actors. In making sense of this, it is useful to have a way of describing these levels – as long as we do not then treat them as disconnected from each other. Movement learning on a macro level is a social learning process that involves "sub" processes. There is the intensive, ongoing learning which is "internal" to the movement, and an "external" learning process that occurs as the movement develops counterpublics and then moves towards, typically through conflict and contestation, remaking dominant ways of thinking, feeling, and doing things in society.

This idea will be familiar to activists who work within certain traditions such as Freirean popular education or Gramscian Marxism where there is a strong emphasis on the incremental effects of cultural work as a dialectical learning process which moves outwards. But this will not be self-evident to all activists. For this to be fully grasped it requires study and time.

The best way of getting to grips with these dialectical learning processes will depend on your interests and context. Nevertheless, we do not want to simply note this and move on. We think it is more helpful to offer some illustrative suggestions and useful resources that can be used in preparation, or even within, this module if there is time. For example, you could draw upon "history from below" such as E. P Thompson's classic work The Making of the English Working Class (Thompson, 1963). It covers a fifty year period in the development of working class consciousness and politics at the turn of the nineteenth century. It captures the energy and multiple factors involved in this class formation process in great empirical detail. It imparts a sense of how complicated cultural processes unfold over time and the movement learning that is involved. Alternatively, one could turn to The Many Headed Hydra (Linebaugh & Rediker, 2000) which treats the Atlantic as a space of organising and cultural exchange from below over several centuries. You do not have to choose materials with such a broad historical scope: you could also turn to oral histories or studies of campaigns or groups such as the history of the United Farm Workers Trampling out the Vintage or Black Against Empire (Bardacke, 2012). It could be a film like in the Hour of the Furnaces (Getino & Solanos, 1968) or even certain types of novels such as We Want Everything (Ballestrini, 2022). The key things are that socio-political processes are described on various levels, that the material is empirically rich, multi-voiced, and deals with the contradictions and tensions of movement building. It cannot be a flat propagandistic text or film. The material should also cover a long, or at least intensive, period which allows the unfolding of patterns in thinking, feeling, and action to be made clear. These specific suggestions may or may not be pertinent to all of us, but what we want to communicate is the importance, even if left largely invisible in the facilitation of the module learning activities, to grasp movement learning on this scale.

Activist learning in movements

Alongside this there is a small but coherent body of research that looks directly at movement learning, mainly from an adult education and critical sociology perspective. Here the historical horizon of societal learning is still visible, but the primary focus is on activist learning at an "organisational level" as this relates to campaigns and specific interventions with groups and communities.

This is the day-to-day movement learning that occurs while acquiring and developing the skills, knowledge, and attitudes necessary for activism. Much of this involves learning from other activists. This type of learning is a little more defined and more experientially proximate than the idea of societal learning. We want to mention two books in particular here. Griff Foley's *Learning in Social Action: A Contribution to Understanding Informal Education* (Foley, 1999) offers case studies of housing, environmental, feminist and national liberation movements and documents the range of learning that occurs within them and the types of context where this takes place (formal, non-formal, informal). Foley argues that informal and incidental learning are especially important in activism but frequently undervalued. He also notes that movement learning is often blocked or stuck and we should pay attention to this. Aziz Choudry also pays attention to types of learning across different contexts in his book, *Learning Activism: The intellectual life of social movements* (Choudry, 2015) arguing that we should also celebrate the richness of learning and we need to think about how this is captured and used (see also Module 5). Furthermore, these writers alert us to how we learn at different points in movement activity (learning in the midst of struggle or reflecting after a cycle of struggle has ended for instance).

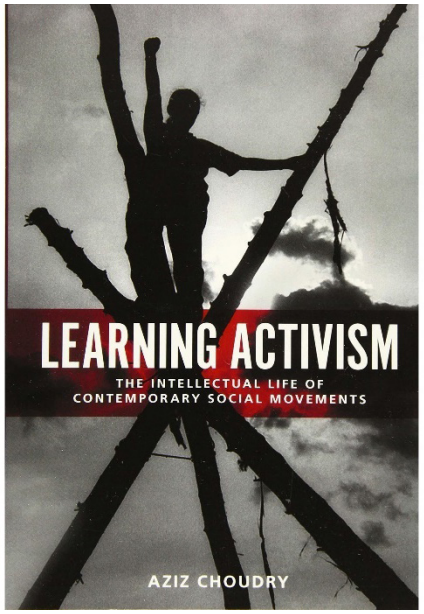

Figure 4. 2. Book cover of Choudry, A. (2015). Learning Activism: The intellectual life of social movements. University of Toronto Press.

Learning and education

Drawing on these sources, this module highlights the range and extent of learning as well as the conflict and tensions that arise in these movement learning settings. It also seeks to sensitise activists to questions of scale and scope, context and formality, depth and significance, and to shifts and continuities in movement learning. Being able to name these aspects and dimensions of learning and say what might be especially important in a given movement setting is vital for planning and strategizing. John Holst, Mai Atta, Budd Hall, Darlene Clover and Rebecca Tarlau have all done research that can be readily used in making sense of the complexities of movement learning and this is explored through the learning activities below. One key question that emerges from this research is what is best learnt informally (through resources, mentoring) and what is best fostered through education. This question is also brought into view through the activities.

Learning activities

Defamiliarising the familiar

This activity sets out how one might link this module to the activities in Module 1. The main part of this learning activity is a reflective exercise which asks people to take note of the range and extent of the learning that goes on in their organisation/campaign/movement. It also describes how this can then be followed up with a group discussion.

Activist learning: when, where, what, how, and with whom

This is a three part activity. The first part involves making a rough map of where learning takes place in participants' contexts. The second part involves an exercise where participants move around a room in response to questions to elicit patterns in their experiences of movement learning (what, when, how and with whom) and to begin to ask critical questions about activist learning. The third part is a pair exercise followed by a group discussion on these themes and which encourages participants to explore the relationship between learning and education.

Movement learning case study discussion

In this activity participants are asked to review a case study of movement learning. This is followed by a short piece of writing/audio reflection and group discussion.

Learning needs assessment

This is a short questionnaire with a set of questions and prompts which participants are given to assess learning needs in their own context. It also outlines how this can be followed up through group work activities.

Learning Resources

- Atta, M. & Holst, J. (2023) Deriving a theory of learning from social movement practices. *European Journal for Research on the Education and Learning of Adults 14 (2023) 1, S. 177-196* .
- Ballestrini, N. (2022). *We Want Everything*. Verso.
- Bardacke, F. (2012). *Trampling Out the Vintage: Cesar Chavez and the two souls of the United Farm Workers*. Verso.
- Bloom, J. & Martin, W.E. (2013). *Black Against Empire. The history and politics of the Black Panther Party*. University of California Press.
- Choudry, A. (2015). *Learning Activism: The intellectual life of social movements*. University of Toronto Press.
- Choudry, A. (2019). Presentation at 'Social movement learning and the struggle for social justice: radical voices from the Global South'.
- Eyerman, R. & Jamison, A. (1991). *Social Movements; A cognitive approach*. Penn State Press.
- Foley, G. (1999). *Learning in Social Action: A contribution to understanding informal education*. Zed books.
- FreshEd Podcast. (2024). *Activism and Social Movements (Aziz Choudry)*.
- Getino, O & Solanos, F. (1968). *The Hour of the Furnaces*. Grupo Cine Liberación.
- Hall B., Clover, D., Crowther J., & Scandrett, E. (2012). *Learning and Education for a Better World: The role of social movements*. Sense Publishers.
- Holst, J. (2001). *Social Movements, Civil Society, and Radical Adult Education*. Praeger.
- Langdon, J., Jackson, M., & Kitchener, S. (2020). Stories and songs as social movement learning in Ada Songor salt movement. In Grummell and Finnegan *Doing Critical and Creative Research in Adult Education*. Brill.
- Linebaugh, P. & Rediker, M. (2000). *The Many-Headed Hydra. The hidden history of the revolutionary Atlantic*. Verso.
- Newman, M. (2006). *Teaching Defiance*. Jossey-Bass.
- Novelli, M., Benjamin, S., Çelik, A., Kane, P., Kutan, B., & Pherali, T. (2021). *'Laboratories of Learning' Education, Learning and Knowledge-Making in Social Movements: Insights from Colombia, Nepal, South Africa and Turkey*. ESRC Grant No: ES/R00403X/1. Final Project Report. Brighton: University of Sussex. Available at
- Tarlau, R. (2015). *Occupying Schools, Occupying Land: How the landless workers' movement transformed Brazilian education*. Oxford University Press.
- Thompson, E. P. (1963). *The Making of the English Working Class*. Penguin
- Zibechi, R. (2012). *Territories in Resistance A cartography of Latin American social movements*. AK Press.

MODULE 3: POPULAR EDUCATION: HISTORY, IDEAS AND PRACTICES

Introduction

This module focuses on popular education. It sketches out a brief history of radical and popular education including some areas of difference and debate and seeks to connect to the vitality of these long standing traditions. We focus primarily on the ideas and practices of Paulo Freire, as well as his collaborations with others. The learning activities in this module are designed so that participants familiarise themselves with this history and explore how popular education has been approached in diverse sites and movements and the impact this has had. This perspective is brought to bear on the questions of the group that were elicited in the previous two modules. It explores the ways in which movement education might be approached using these ideas and practices.

Learning aims

- Build awareness of the long history of radical education
- Acquire knowledge of the core ideas and practices of radical popular education
- Critically reflect on the relevance of these ideas and practices to participants' activism
- Spark hope in what might be possible through popular education
- Increase awareness of good practice in pedagogy and facilitation
- Analyse some of limitations of popular education

Pedagogical challenges

This module assumes that the educator has a good knowledge of popular education history, ideas, and practices. It is envisaged that an exploration of the radical popular education tradition will help refine, and to some extent, answer some of the questions generated in Modules 1 and 2. If these ideas are new, we suggest that the whole module is approached as a joint exploration of this tradition.

A long history of radical education and the need to deschool the imagination

We noted earlier that currently education is most frequently approached as a site of struggle over public resources and knowledge but less often viewed as a fundamental and constitutive activity of movements. However, there is a long, varied, and proud history of radical education. This includes an enormous range of initiatives ranging from Republican circles in the late eighteenth century through to Occupy University. There are centuries of educational tradition seeking equality, teaching defiance, building solidarity and helping movements to understand and to change the world. This is, it needs to be emphasised, a living tradition. This history, as well as the ongoing efforts, are often "under the radar" even in activist circles. Part of the aim of the module is to share examples of these initiatives.

Radical educational initiatives and institutions come and go, often lasting only a few years and typically leave little obvious traces behind except in the memories of the people who participated in them.[6] This is in striking contrast to schools and universities where the spaces, rituals, and roles that go with them are firmly established in physical space and in the social imagination. To break with these dominant ways of imagining and organising education, a small – but not unimportant – element is to know some of this underground history of movement education.

6. There are notable exceptions to including Highlander in the United States which is explored in the learning activities. See also the resources below.

Figure 4. 3. Industrial Workers of the World, 1919 (Source: UW Digital Collections).

Popular education

The radical education tradition overlaps with, but is not identical to, popular education. You will find versions of popular education inspired by a desire for national renewal or by religious belief as well as by radical social purpose. But all the varied strands of popular education do share four core ideas: education needs to be accessible to everyone regardless of social background; there are significant social obstacles to making education fully inclusive and accessible; living education needs to connect with everyday life and culture rather than merely transmit ideas and values from above; and education should be democratic in form and purpose. The radical popular education tradition fuses these ideas with a commitment to emancipatory social transformation. Two of the most inspiring versions of radical educational work are a fusion of these traditions – the Highlander school in the United States, and the popular education traditions in South America. We will examine both in the Learning activities but will foreground Freire.

Figure 4. 5. Highlander Folk School near Monteagle, Tennessee (Source: Swiss National Library, SLA-Schwarzenbach A-5-10/118).

Popular education in South America and Paulo Freire

South American popular education emerged out of the ferment of movement in the 1950s-1970s. The energy and insights of anti-imperialist and anti-colonial movements, student movements, peasants and workers movements, all fed into a profoundly innovative approach to education. The best known and most influential articulation of these ideas came from the Brazilian popular educator Paulo Freire

The contours of Freire's life story are well known, and we will just offer a brief retelling here.[7] Experiments in university extension, popular culture circles, and adult education initiatives led Freire to develop a highly effective approach to pedagogy and adult literacy in the late 1950s in Brazil. He became well-known and was tasked by the Goulart government to develop a national literacy campaign. However, these efforts were cut short by a military coup in 1964. A period of imprisonment was followed by fifteen years of exile. Freire went to Bolivia briefly and then Chile for several years where he developed his ideas further and in a more radical direction. After a brief stint at Harvard, he took up a position in the World Council of Churches. Under the auspices of the education section of this ecumenical organisation he spent a decade travelling, meeting with students, activists, and educators in every corner of the world. After his return to Brazil in 1980, Freire sought to apply these ideas in formal, state institutions, as a member of the Workers Party, and in connection with wider social movements.

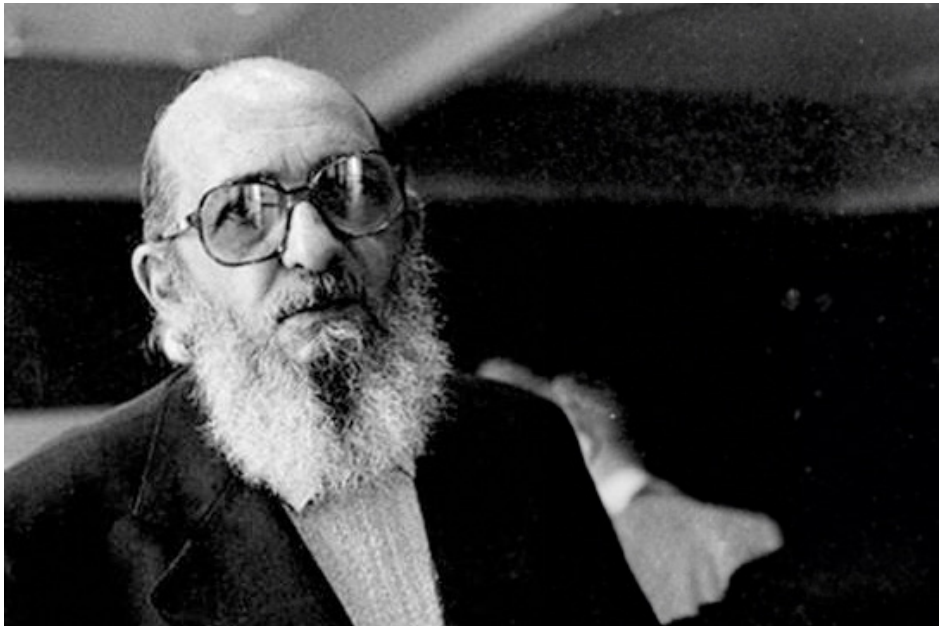

Figure 4. 6. Paulo Freire, 1977 (Source: Slobodan Dimitrov, CC BY-SA 3.0).

His ideas are outlined in a series of books, the most influential of which is *Pedagogy of the Oppressed* (Freire, 1972). We also want to mention his reflections on a life in radical education, *Pedagogy of Hope* (Freire, 1994), the book based on conversations he had with Myles Horton and others *We Make the Road by Walking* (Horton, Freire, Bell, Gaventa, and Peters, 1990), and his writings dealing with his work in the newly independent Guinea-Bissau, *Pedagogy in Process* (Freire, 1978), as especially valuable resources for activists. Anchored in a lifelong commitment to radical, socialist humanist politics and liberation theology, his work has been one of the most generative sources of radical educational thinking and practice.

We are not interested in presenting Freire as a saint or a seer. There are gaps and flaws in Freire's ideas and the social and political landscape has altered

7. A more detailed overview of Freire's life can be found here along with a more extensive bibliography.

greatly since his death, as we have argued elsewhere (Finnegan & Cox, 2023). All the same, Freire's life in struggle is worth remembering in the context of the MLC, and we regard his ideas as collective inheritance from a particularly important period of struggle.

Let us briefly recall Freire's core propositions: he was insistent about the need to dialectically analyse education and society as a totality. Drawing on Hegelian Marxism and anti-colonial theory, Freire broke new theoretical ground by describing society in terms of complex and conflictual socio-historical learning processes which are fundamentally linked to power and politics. He describes education as a set of formal interventions which shape, and often limit, distort, or even destroy, our capacity to learn.

His mode of analysis and critique of "banking education" – that is, traditional top-down education concerned solely with transmission and the passive consumption of knowledge – was influenced by Erich Fromm. He maintained that the desire to be free is a fundamental aspect of human life. He counterposed this with an idea of emancipatory education which is active, dialogical and where knowledge is created and recreated in a dynamic way in context and over time.

Emancipatory knowledge, he argues, emerges through critical reflection which can dialectically link situated experience and knowledge to general social needs through an accurate "reading of the world". Dialogue across and between communities of the oppressed is both the precondition for, and one of main purposes of, critical education. What is envisaged is a type of educational practice in formal and non-formal settings which embeds critical reflection in social processes, encourages democratic participation, undermines hierarchies, and creates new forms of shared knowledge.

Crucially, these ideas were tested in practice. This is not merely an educational version of critical theory, rather it is a theory of educational praxis which is realised through popular education and ongoing experimentation in critical pedagogy. In the learning activities we use these ideas and examples of popular education in practice to consider the questions of the group generated in the first two modules. We also examine issues of educational design, facilitation, and the role of learning in alliance building, as well as the relationship between learning and education and how activists might describe significant learning.

Developments in popular education: diverse initiatives, achievements, and open questions

As a living pedagogy realised across multiple, highly diverse contexts, radical popular education has taken many forms and gone through significant shifts and elaborations over the past two generations. You can see how the ideas have travelled and changed when you look across the handbooks and articles in the resource section below. Freirean ideas have been used by activists and educators to work with millions of people. This is easiest to trace in large-scale initiatives such as mass literacy campaigns in places such as Nicaragua and Timor Leste and in high profile movements such as the anti-Apartheid movement in South Africa or the Landless movement in Brazil. But it is worth saying that most popular education does not operate at this scale. It exists at the edges of trade union education, in feminist reading groups, in anti-capitalist events, in community education initiatives, anti-racist campaigns and so forth. The learning activities in this module explore the scale, duration and forms popular education has taken and what this might mean for activists participating in the module.

Thes multi-faceted efforts have extended and changed Freirean concepts and popular education practices. In Latin America this has been particularly fruitful, some of which has been documented by CEEAL a network of South American and Caribbean educators. For Anglophone readers this history has been illuminated by Liam Kane in books and articles.

Figure 4. 7. Mural on the side of a Zapatista school, 2010 (Source: Mr. Theklan, CC BY-SA 2.0).

Below Kane (2012, pp. 70-71) offers a summary of current popular education thinking. Quoting this at length will indicate how these efforts have extended popular education and the sort of ideas that are seen as central in contemporary popular education. The aim of popular education is to promote: Political Knowledge, Dialogue and Critical Subjects whose Method of Collective Action Humanises the Educator' an aide-memoire for:

Political: popular education has a political commitment in favour of the "oppressed," "poor," "marginalised" or "excluded." All education is considered inherently political, either working to support or change the prevailing unjust social order, and popular education addresses this openly.

Knowledge: epistemologically, it recognises that all people have important knowledge derived from the particular experiences in which they find themselves: useful knowledge is not the exclusive preserve of academics, technicians or experts.

Dialogue: education should consist of dialogue between different "knowledges," not simply the depositing of an expert's knowledge into the mind of those perceived to be ignorant, what Freire (1972) calls "banking education."

Critical: it should develop critical thinking among learners, so that people can recognise and understand the mechanisms which keep them oppressed; increasingly, it encourages creative thinking and the ability to make concrete proposals for change.

Subjects: the aim is not to manipulate thoughts or create dependency on charismatic leaders but to enable people to become authentic agents or "subjects" of change themselves.

Method: the methodology of popular education should promote a "dialogue of knowledges" (Ghiso, 1993) and encourage people to think and act for themselves. To this end popular education has developed an impressive range of "participative techniques" (Bustillos & Vargas, 1993).

Collective: the concern is to help enable people progress collectively, not to single out individuals for special treatment. This does not mean, however, that individual needs are ignored.

Action: echoing Marx, the point is not just to theorise but to try and bring about social change. As such, popular education is linked to action for change, particularly in the different popular social movements all over Latin America, where "the movement is the school" (Freire, 1991).

Humanises: some argue that the raison d'être of popular education is "above all an ethical commitment in favour of humanisation" (Zarco, 2001:30).

Educator: the role of the educator is not to provide answers but to ask questions and stimulate dialogue, debate, and analysis. But popular educators also contribute to the dialogue and are not merely "facilitators": in the end, though it should never be manipulative, popular education is undeniably interventionist.

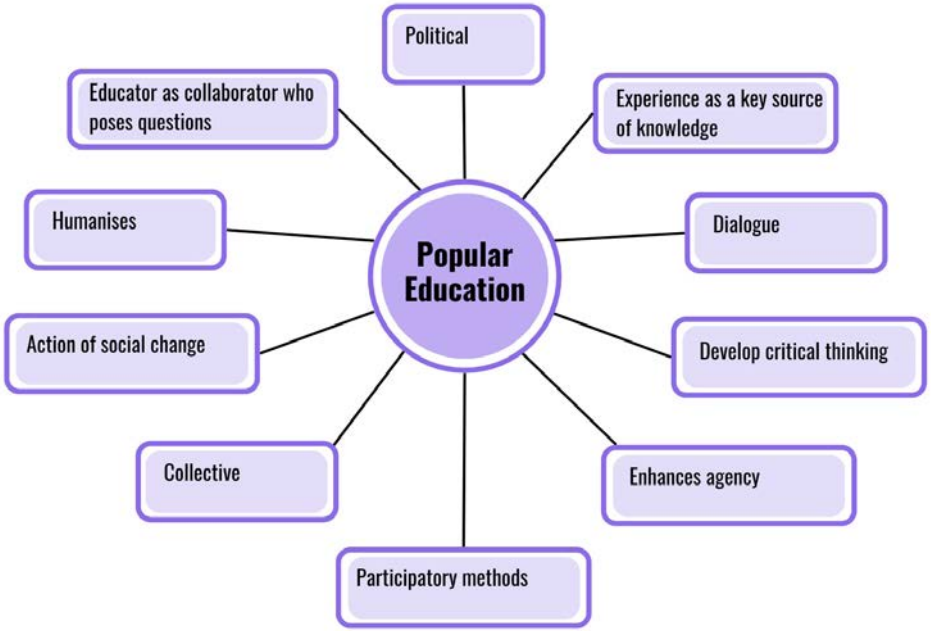

Figure 4. 8. Popular Education propositions adapted from Kane (2012, pp. 70-71)

Open questions

An enduring concern is the extent to which popular education ideas can, and should be, used to remake state institutions. Alongside this have been explorations of those who are the key protagonists in popular education processes (the working class, peasants, racialized groups, women, the marginalised, indigenous communities etc.). It is important to note that an acknowledgement of difference and plurality have become more prominent in popular education circles over the past years. As one might expect ideologies and conceptions of emancipation brought to bear on this thinking are also varied, and sometimes conflicting. It is pertinent to mention versions of socialism and feminism have been the most prominent.

In the learning activities you'll find ways of using these case studies to reflect and think about these questions and the relevance, or lack of relevance, of popular education practices to other contexts. In this sense this module seeks to acknowledge and even celebrate popular education but in a critical spirit that does not overclaim what can be achieved by education alone. We want to explore which of the ideas and practices elaborated within popular education remain powerful and also what else we need for effective movement education.

Learning activities

Radical and popular education

This activity offers suggestions of how to introduce the topic. It outlines a game which can be used to help participants become acquainted with figures and ideas in radical and popular education. There is then a small group activity on experiences of education. This segues into comments on how this can be used to discuss Freire's ideas in more detail. This then bridges into a group activity exploring popular education principles. It is concluded by a group discussion activity which poses questions about how these ideas and practices might relate to participants' activism.

Reading Freire

In this activity we discuss how to set up a reading group to look at Freire. It outlines how to select a section of Pedagogy of the Oppressed or another work and how this can be followed up in a single or in multiple sessions.

Popular education case studies

Participants are asked to choose a popular education case study and this is then explored through pair and group work. A key focus of this activity is using the case study to reflect on participants' own activist contexts.

Generating generative themes

This is a two part exercise. The first part is an exercise in which participants take a photo or select an image which is then shared in the groupand used to discuss and conduct a group analysis of their generative themes. In the second part these themes and the previous discussions in the module are used to explore the relevance and limitations of popular education for participants.

Learning resources

- Barndt, D. (2012). ¡VIVA! *Community Arts and Popular Education in the Americas*. SUNY.
- Crowther, J. (2013). *The international popular education network: Its purpose and contribution*. *Rhizome Freirean* 18.
- Flowers, R. (2009). Traditions of popular education. *Zeitschrift für Weiterbildungsforschung*, 32(2), 9-22.
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- Hooks, B. (1994). *Teaching to Transgress: Education as the practice of freedom*. Routledge.
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- Manicom, L. & Walters, S. (2012). *Feminist Popular Education in Transnational Debates*: SpringeR.
- Mayo, M. (2020). *Community- Based Learning and Social Movements: Popular education in a populist age*. Policy Press.
- O'Cadiz, M., Torres, C. A., and Lindquist Wong, P. (1998). *Education and Democracy: Paulo Freire, social movements and educational reform in São Paulo*. West View Press.
- Reeves, S. (2020). *Reflections on 40 Years of ALP* (the Adult Learning Project).
- Shor, I. (1992). Empowering Education: Critical teaching for social change. University of Chicago
- Shor, I. & Freire, P. (1987). A Pedagogy for Liberation: Dialogues on transforming education. Macmillan.
- Steele, T. (2007) *Knowledge is Power: The rise and fall of European popular educational movements*, 1848-1939. Lang
- Tarlau, E. et al. (2013) . The Social(ist) Pedagogies of the MST: Towards new Relations of Production in the Brazilian Countryside. *Education Policy Analysis Archives*, 21(41).
- Torres, C. A. (2019) (ed.). *The Wiley Handbook of Paulo Freire*. Wiley and Sons
- Von Kotze, A. & Walters, S. (2018). *Forging Solidarity: Popular education at work*. Sense Publishers.
- Von Kotze, A. (2014). *On Popular Education for Social Justice: traditions and new directions*.

MODULE 4: DIALOGUE AND RESEARCH IN MOVEMENT LEARNING AND EDUCATION

Introduction

Radical popular education is built around the belief in the importance of critical dialogue. Dialogue is viewed as the basis of cultural development, significant learning, and emancipatory education for communities and groups in struggle. In this module we will explore what is meant by dialogue in radical popular education, how this can be fostered pedagogically, and what a commitment to dialogue means for thinking about political activism.

An important aspect of the way dialogue is approached in radical popular education is the strong emphasis given to research as part of the educational process. Establishing and developing critical dialogue in communities and across movements entails systematic research (including, for example, community needs study, historical and power analysis, surveys on cultural interests and practices etc.). We will explore in this module how participatory action research (PAR) emerged out of popular education and why this might be important for how we understand knowledge and learning. The module also seeks to open up more general questions about the use of research in activism and some of the methods that are useful for this including community studies, oral histories, and feminist arts-based methods which combine political action with activist learning.

Learning aims

- Explore the uses of dialogue in political activism and movement learning
- Look at the dispositions and practices which foster dialogue and also the things that block dialogue
- Discuss Freirean notions of dialogue and critically examine this in the light of lived experiences and, where applicable, other approaches to fostering dialogue
- Explore how and why research is important in radical popular education
- Offer an introduction to the rationale and use of participatory research and examples of how this has been done
- Examine some examples of other research practices and whether these might be useful in participants' contexts

Pedagogical challenges

Depending on how much time one has spent investigating popular education in the previous module, one may confuse dialogue with discussion or even debate, so care needs to be given to making clear the specific meaning given to dialogue in the module.

Many activists have had very little experience of dialogue in the sense that it is understood in popular education. So it may be experientially distant and perhaps seem far-fetched to them. If the educator has had experience of being part of a genuine critical dialogical process themselves in the past this will enable them to hold and work with this tension.

The need to develop forms of active listening and deep communication in a group setting is, we think, self-evident. In most political circles this will be un-

controversial. However, when exploring this claim through learning activities, awareness of the profoundly anti-dialogical nature of dominant culture is critical. One should also not underestimate the extent to which empiricist, positivist, and instrumentally-orientated conceptions of knowledge and learning and traditional education hamper dialogue even amongst radical and progressive activists. Besides this, the pressure of events in many activist contexts, and lack of time, as well as the persistence of top-down traditions of political organising, play a role here.

Lastly, one should anticipate the need to consider carefully the sorts of sites, settings and groups that where one thinks a critical dialogical mode of engagement is valuable (for example with migrant groups, working class communities and in movement educational settings) and where it is fruitless, or even counterproductive (with employers groups, neoliberal political parties, organised hate groups etc.). This is a likely point of discussion and difference as this will depend on how participants understand oppression and strategies of political transformation.

The importance of dialogue

The idea of dialogue is fundamental in the radical approach to popular education, and it is an idea that bridges the ethical, practical and political dimensions of pedagogy. From this perspective, dialogue is something different than conversation, discussion or debate; it is understood as a joint exploration of issues, ideas, and concerns in an open, dynamic process. It involves moving together rather than simply stating positions. Dialogue does not require that a group arrives at a consensus, but it does require active listening and consideration of multiple perspectives on a topic. It is also an embodied matter and cannot be approached solely through what is verbalised. The affective and tacit dimensions of dialogue should not be underestimated.

To return to a claim made earlier in Modules 1 and 3, behind this notion of dialogue is the idea that we are at root curious beings who can only make sense of constantly shifting social and political circumstances with others. According to Freire (1972, especially chapter 3), Horton et al. (1990), and Hooks (1994), we can only make critical sense of things by open, egalitarian, free exploration of our experiences in context, by naming things and developing new categories of analysis and possibilities for action. For these writers, the core conditions for dialogue are openness and humility, care, and even love, combined with a sense of purpose and political clarity. But it also has to be critical. A dialogue is critical when it deepens understanding of self and context and helps to explain and clarify the political conditions for action. From a popular education perspective, any discussion of the day-to-day work of education – in terms of design, curriculum, and facilitation – should be built on the idea of dialogue.

Figure 4. 9. Bell Hooks, 2023 (Source: Ikusgela, CC BY-SA 4.0).

Again, we want to assert the importance of an openness to alternative perspectives when using the materials in this module and this chapter. As with popular education more generally, it is a mistake to take any particular theoretical and political set of arguments about a widespread practice such as dialogue as the only valid "model". Dialogue – and linked ideas related to pedagogy, facilitation and effective communication – are very widespread and are articulated in different ways. For instance, there are versions of systems thinking, psychodynamic and spiritual practices that activists may well be working with and may want to explore alongside with, or in opposition to, the popular education approach.

Dialogue in communities

This notion of dialogue can be applied to two distinct learning processes which are ideally viewed and experienced as dialectical: 1) activist training/education; and 2) engagement and learning with communities and groups. Perhaps one of the most significant contributions of the radical popular education tradition is to think about how knowledge can be explored in a context-dependent, non-dogmatic, yet politically-committed way. Activism in this context can be understood as dialogical sense-making between people and communities in struggle.

Dialogue and political organising

In some iterations of popular education, the idea of dialogue is viewed as fundamental to political organising strategies generally. The proposition is that a dialogical approach should guide how parties and groups develop political programmes, think about models of leadership, and approach social change. How activists and communities in struggle learn could also be viewed as how parties, groups, and movements should organise. This, it is argued, will help movements to become genuinely democratic and participatory. This obviously carries with it a particular set of ideological assumptions which people may want to explore in the learning activities. This is close to the way organising is understood by some feminist and ecologist traditions, and is a defining idea in anarchism and libertarian versions of Marxism. These ideas are not always shared though. As before, the aim should be to develop a critical conversation about the use of dialogue in learning, education, and organising

Research and movement learning

Activism demands research. Documentary research, observation, and needs analysis in a group, community, or workplace setting are just part of the everyday work of activism. There is a tendency – as with learning – to overlook this. It is just part of what it means to be an activist. Often it is not even seen as research, and certainly not "proper" research which is sometimes viewed as the sole preserve of experts and academics. In popular education circles though, research is named and foregrounded as integral to education. As we have outlined elsewhere in this publication, if you believe that learning needs to be responsive to questions of practice and context, and that it needs to build a dialogue about social experience in a critical way, then you can't embark on popular education without research. If dialogue is treated as central to engagement and organising, then participatory research is vital to activism more generally.

One of the sources for this thinking comes from the early literacy projects conducted by Freire and other popular educators. In these, intensive community studies were done using historical and geographical analysis, in-depth interviews (which would now be called focus groups), as well as using photography and film. On the basis of this, particular generative themes and words were identified which were linked to people's cultural experience and needs. These would then be explored through critical dialogue using codifications of various sorts. These codifications – visual, narrative, or textual representations of everyday life – were used to prompt critical reflection.

This approach fed directly into the development of Participatory Action Research (PAR). With PAR, the idea is that a systematic, collaborative exploration of social experience driven by communities and groups in struggle can create cultural resources, recover historical memory, and strengthen movements. It is important to note the impetus behind PAR came from many others alongside Freire. People such as Rajesh Tandon in India, Budd Hall in Tanzania and Canada, John Gaventa in the US, and probably, most famously, Fals Borda in Colombia. The fundamental idea behind PAR is no longer controversial and is commonly used, sometimes even apolitically, but the tools and practices of PAR remain very useful. The learning activities invite reflections on this.

One of the other things this module is concerned with is to open up space to talk about the range of things that can be done in relatively easy ways to bolster movement learning alongside PAR (such as oral history). In particular we want to highlight the work of feminists and the development of photo voice methods and art-based approaches to pedagogy and activism.

Learning activities

Dialogue principles and practices

This learning activity begins with two exercises exploring what supports and what hampers dialogue. It then outlines how this can be brought to bear on a discussion of the principles and practices of dialogue in radical popular education. It includes a suggestion for an optional follow-up, arts-based activity on the theme of dialogue.

Reading and discussion on dialogue

In this activity participants are asked to read a piece by a radical educator or suggest their own reading on dialogue which is later discussed in a small group. An account of this discussion is then shared in the full group. This activity is one which can be easily adapted to move outside, or be critical of radical popular education, including when dialogue is necessary or inappropriate in activist education and the extent to which this should inform activist engagement and organising.

Research in and on your movement

This is a research activity in three parts. The first step involves participants assessing what research occurs, or has occurred, in their movement organisation or campaign, and the methods used. The second step asks participants to see if they can find other research on their movement assessing how and why it was done. The final step involves exploring what type of research would be useful in participants' contexts. This is concluded with a group exploration of research and power linked to questions of dialogue, learning and education drawing on PAR and other participatory approaches to research.

Learning resources

- Many of the resources on dialogue cited in Module 3, are relevant here as well, see especially Shor, Freire, hooks and Horton on dialogue.
- Clover, D.E. & Stalker, J. (Eds.) (2007). *The Arts and Social Justice: Re-crafting adult education and community cultural leadership*. NIACE.
- Fals-Borda, O. (1999). *The Origins and Challenges of Participatory Action Research.*
- Fals-Borda, O. and Rahman, M.A. (1991). *Action and Knowledge: Breaking the monopoly with participatory action research*. Apex Press.
- Freire, P. (1972). *Pedagogy of the Oppressed.* Penguin Grummell, B. &
- Finnegan, F. (Eds.) (2020). *Doing Critical and Creative Research in Adult Education: Methodologies and case studies*. Sense/Brill.
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- Horton, M., Freire, P., Bell, B., Gaventa, J. & Peters, J. M. (1990). *We Make the Road by Walking: Conversations on education and social change*. Temple University Press.
- Participatorymethods.org. *Facilitating workshops for the co-generation of knowledge.* This website has a range of useful resources on participatory research.
- Rappaport, J. (2020). *Cowards Don't Make History*. Duke
- Shor, I. & Freire, P. (1987). *A Pedagogy for Liberation: Dialogues on transforming education*. Macmillan.

MODULE 5: LOST AND FOUND: HARVESTING, RECORDING AND DISSEMINATING MOVEMENT LEARNING

Introduction

This module brings together several of the strands we have covered, and we begin by asking participants to reflect upon the materials and themes of the four preceding modules. They are asked to assess the salience of the learning as a whole for their current and future activism.

Building on this, we turn from social movement learning and popular education to the related theme of knowledge production in our movements. We will discuss ways of thinking about knowledge production and what we see currently in our groups and organisations in this regard. This is situated within a social analysis of knowledge production more generally. We will consider the extent to which the way we produce knowledge in movements is strategically effective and useful. We will share examples of activist knowledge production and how this relates to research (such as archive building, collective inquiry, podcast series, life history projects etc.) and the creation of movement space for sharing knowledge.

Learning aims

- Reflect critically on prior modules on movement learning and education
- Spark a discussion about what gets recorded and what gets lost in cycles of movement learning and education
- Explore how theory is used and created in movements
- Discuss examples of how movement knowledge is held (in group practices, archives etc.) and how it is disseminated (publications, podcasts etc.)
- Highlight the importance of supporting and sustaining knowledge production

Pedagogical challenges

The idea of knowledge production is likely to be unfamiliar to some participants, but what it means and its implications for activism are clear. As such, there are no significant pedagogical challenges here, bar ensuring that links are made between what has been covered earlier in relation to learning and education and ensuring that this is properly linked to the theme of knowledge production.

Learning, education, and knowledge production

Over the previous four modules, learning and education have been explored in different ways. If you are interested in planning and developing these practices over the medium-term, how knowledge is recorded, codified, and shared (or not) presents itself as an important issue. Not least because what Alans Sears (2014) has called the "infrastructure of dissent" that sustained such knowledge production in the past has become very ragged or even nonexistent. We are convinced that there is a great deal of movement knowledge being lost currently. In defeat we often turn away, in the heat of battle we need to focus on getting things done, and after victories we often move to the next thing. Paying attention to how knowledge is produced through cycles of learning and the selective harvesting and recording of this learning is, we think, integral to deepening movement learning and for long-term educational planning,

This cannot be understood separately from wider social trends. We live in a world characterised by the overproduction of information and the commodification of knowledge of all sorts linked to the dynamics of capitalist accumulation. This means activists are flooded with forms of knowledge which are distant and distancing from activist practice. Prepackaged approaches to organising, corporate models of training and development, academic theory which claims radical intent but is completely disconnected from activism, poetic pessimism, and mainstream futurology circulate widely in activist circles.

We also want to highlight the role of academia and the mass experience of post-compulsory education (in colleges, universities and institutes of higher education). Our generation is more acculturated and used to academic approaches to knowledge and learning than any other generation of activists in the past. This is something we need to consider in thinking about how we consume and produce knowledge. As Choudry and Kapoor (2010, p. 9) note:

> "The voices, ideas, perspectives and theories produced by those engaged in social struggles are often ignored, rendered invisible, or overwritten with accounts by professionalised or academic experts. In the realm of academic knowledge production, original, single authorship is valued, which inadvertently contributes to a tendency to fail to acknowledge the intellectual contributions of activism, or to recognize the lineages of ideas and theories that have been forged outside of academe, often incrementally, collectively, and informally." (Choudry & Kapoor, 2010, p. 9)

It should also be noted that the massification of post-compulsory education does not mean that access to education is equal. Inequalities in educational access, and different expectations and norms around knowledge, also affect, often tacitly, how activists from different backgrounds interact and how activists and communities interrelate.

Social media offers new ways of sharing and producing knowledge, but it has also contributed to an accelerated and uncritical approach to creating knowledge. These problems are also affecting training and education, and we want to consider how social media is supporting as well as obstructing movement learning and knowledge production.

We want to critically explore how changes in movement infrastructure, the economy, education and social media shape expectations and norms around movement education, learning, and knowledge. By highlighting the specificities and value of knowledge produced by activists and for activists, and building on discussions in earlier modules, we ask how we can best document our learning, share practices, and develop theory. Finally, through the learning activities we spark a conversation about knowledge and cultural institutions and the role of activist archives, museums, and other cultural spaces on and off line.

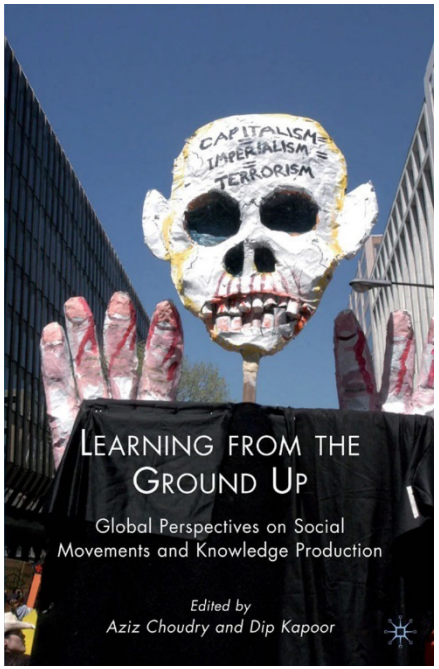


Figure 4. 10. Book cover of Choudry, A. & Kapoor, D. (2010). Learning from the Ground Up. Global perspectives on social movements and knowledge production. Palgrave.

Learning activities

Bringing it all back home

In this activity, we describe how to draw on material produced in the previous modules in a reflective exercise and how this can be used in a group discussion or a walking debate to begin a discussion about knowledge production.

Lost and found: movement media and spaces

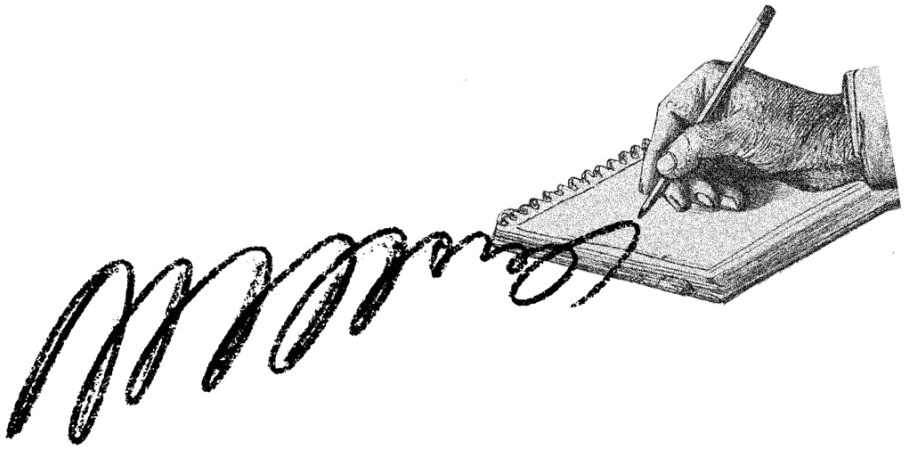
Participants are guided through a mapping of the way knowledge is produced, circulated, and consumed in their activist groups and movements as well as a reflective exercise on how this relates to movement media and spaces - including archives - in the present. They are asked to take account of how movement learning and education might alter this in the future.

Walking the city: knowledge institutions and flows

This activity outlines a walking activity that can be completed by individuals, pairs, or small groups as a way of taking account of the way knowledge and information are produced, circulated, and consumed in urban space. This is followed by sharing audio or written reflections and a large group discussion.

Research on movement memory

This is an individual or small group research project in which participants choose a historical movement that interests them and look into what is recorded and lost over time. This is designed as a complementary activity to “walking the city” which leads into an exploration of dominant and subordinate forms of knowledge production in history.



To learn more about the Movement Learning Catalyst learning resources, visit www.movementlearning.org

Notes on Pedagogy:

An Educators' Guide to Using the Movement Learning Catalyst Resources

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PART 5

NOTES ON PEDAGOGY: AN EDUCATORS' GUIDE TO USING THE MOVEMENT LEARNING CATALYST RESOURCES

> Knowledge at its best is about transforming our world. Making life more habitable for humans and other beings, and about preventing the destruction of the planet itself. (Davis, 2018)

Figure 5. 1. Angela Davis at Oregon State University, 1919 (Source: Oregon State University, CC BY 2.0).

Introduction

We have gathered together the Movement Learning Catalyst (MLC) curricular materials in the four parts of this publication so they can be used, adapted, and refined by others. This material is aimed at experienced activists, but we do not want to assume that the people reading through this text are also experienced educators or trainers. This educator's guide has been written with this in mind. We hope by explaining a little bit about how we approach things pedagogically in the MLC it might be useful for readers who want to find their feet as educators.

Learning is a complex, multi-stranded process and so is good pedagogy, but there is no great mystery to how one goes about acquiring the ability to support and shape learning. It is mainly about practice over time and being willing to experiment. Like other crafts, passion is necessary, as is paying careful attention to questions of structure, form, and process. As with any complex human activity, the ability to reflect, adapt, and learn from others is also crucial. For that reason, we want to offer some suggestions about good practice in an accessible but non-simplistic way. We will share the pedagogical principles we used for the MLC and how the reader could make use of the curriculum to develop training or learning programmes for their groups, organisations, and movements. Alongside this, in this guide you will find four "resources for educators" with checks-list, plans, and materials which will help you with the nuts and bolts of working with the curricular materials. Before we begin discussing these pedagogical principles we want to share some comments on the background to this guide and our decision to use the term pedagogy in the MLC.

The Movement Learning Catalyst as a movement learning process

As part of the Movement Learning Catalyst we have designed and held a year-long programme, engaged in extensive research with peers, and from these activities created a range of learning resources, such as this guide. The year-long course has been one of the ways in which we have tested the MLC concepts, frameworks, and learning resources. Developing and piloting the programme has not been straightforward, or always successful, but we have learnt a great deal. It is very much "work in progress". We also know that although the MLC is an ambitious initiative – and we think ambition is more necessary than ever at the moment – it is still relatively small-scale. In truth it is only one tiny green shoot, while the challenges faced by progressive activists in the present conjuncture are immense. Not only are the forces arrayed against us formidable, the resources and infrastructure we currently have at our disposal are quite scanty. Our movements are fragmented and we are sometimes contributing to this fragmentation in self-defeating and often depressing ways. It would not be wise in these circumstances to overclaim on behalf of the MLC. What is crucial for us is to make a start, and through this learning present an open invitation to activists, trainers, and educators to reflect on what we can collectively do to enhance communication, collaboration, and learning across movements and borders.

We are doing this because we are fully convinced there is tremendous power in activists coming together to learn things from each other and with each other. We believe that fostering and deepening activist learning is an important, and often untapped resource, for building, sustaining, and expanding the power of our movements. When we create lively, curious, and inclusive learning cultures we help to ensure that activism is enriching, that we learn from our victories and avoid repeating costly mistakes, become better at alliance building, and develop more reflective and informed approaches to strategy and action. Vibrant learning spaces and collective learning processes also serve to attract and engage the wider public to support and identify with a movement and are vital to developing new ideas, symbols and practices which spread out beyond the movement and, sometimes, even change the world.

If these two simple interlinked propositions – that 1) movement learning is a fundamental aspect of movement building; and 2) that education and training is currently underutilised in progressive movements – are correct, we are confronted with some knotty questions. How can we develop a more adequate movement infrastructure (such as real and virtual spaces for meeting and resources, sustained networks) for cooperation and education? What is useful and necessary to learn at the present time? And how can we foster critical activist learning? The four other parts of this publication offer our answer to what we think might be useful and necessary to learn at the present moment. In this guide we want to focus mainly on the last question and outline some of the educational ideas that underpin the project as a whole which might be of use to you in adapting the curriculum.

Pedagogy matters

Luckily there is a deep well of educational "good sense" at our collective disposal. Activists and adult educators have been thinking through these "how" questions for decades and we can point to many, many examples of excellent initiatives undergirded by innovative and critical pedagogies. Some of this "good sense" is captured in handbooks such as *Training for Transformation* (Hope & Timmell, 1984) or *Community Engagement for Practitioners* (Shaw & Crowther, 2017) and in books, articles, and films. But most of this knowledge is held informally within groups and by practitioners.

Notwithstanding, we think this educational good sense, this knowledge commons, is not always kept in view and drawn upon in our movements. You may well, like us, have attended activist workshops, reading and discussion groups, and campaign and movement trainings that fail to spark or inspire because you

end up just going back over the basics again, or it becomes pointless through indirection, bad planning, and a lack of substantive content. Worse still, are the activist events and conferences, including ones which are explicitly educational, where people are talked *at* and where opportunities for participation are meagre or non-existent.

We mention these widespread problems to underscore the fact that how training and educational initiatives are imagined and designed in any given context matters a lot. A much more concise way of saying this is pedagogy matters. We're aware that the word pedagogy might be a little off-putting for some people. It might strike you, especially if you are from an Anglophone country, as vague and perhaps even a bit grand and posh. You might also be one of those people who treats words as puzzles and notice that the root of the word pedagogy is from the ancient Greek word for child, and therefore you might think "this is hardly the right term when thinking about the learning and education of experienced activists!". These are valid comments, but we want to use the term nonetheless, as the alternatives, such as training or facilitation,[8] do not properly describe what we have in mind. Teaching is even less appropriate.

The decision to use the word pedagogy here also reflects the fact that one of the most significant influences on how we have done things is *radical popular education*. In this tradition the word pedagogy is understood in a specific and, we believe, valuable way. Radical popular education is the work of generations of activists, a collective form of creativity that belongs to no one person. Nevertheless, the best known, and one of the richest sources for reflecting on activist education and learning, is the work of the Brazilian radical adult educator Paulo Freire, including his most famous book is Pedago*gy of the Oppressed* (Freire, 1972).[9] (For more detail on Freire and his ideas please see also *Part 4. Movement Learning and Popular Education, Module 3. Popular education: History, principles and practices*). Pedagogy is used by Freire to denote the importance of thinking critically about context, about knowledge, about relationships and power as well as the overall political purpose of education *in a dynamic and integrated way*. Critical pedagogy therefore cannot be reduced to a set of techniques or methods, rather it is an approach and perspective that offers a holistic, dialectical, and profoundly radical way of thinking about education and power. It invites the cultivation of a type of political imagination attuned to the complexity, intricacy, beauty, and challenges of emancipatory education in a deeply unequal world characterised by unnecessary suffering, domination, and exploitation

Figure 5. 2. Mural on popular education in the National University of Villa María, Argentina, 2023 (Source: Aguzanotti, CC BY-SA 4.0).

8. Training is used widely including by comrades and peers who are doing, or have done, excellent work. Nevertheless, the word carries connotations about skills transfer and simple, replicable learning that are problematic. Facilitation comes closer than training to the perspective of education and learning we are working from, but facilitation is only one, albeit central, element of pedagogy and carries some intellectual baggage – primarily its link to person-centred psychology and a tendency to downplay the political, collective, and directive aspects of pedagogy and education. That said we have benefited a lot from the literature on facilitation and think it is very likely this will be of use to others so we have compiled some resources related to this in the Educators' Resource 2: Facilitation at the end of this guide.

9. The MLC team draws on varied, and in many respects distinct and different, approaches to activist training and education including theories of community education and organising, Buddhist ideas, Marxism, feminism, anarchism, ecology and systems theory, critical pedagogy, and transformative learning theory. We share a commitment to transformative change, critical education and pluralism. Popular education is our pedagogical "common ground".

Departure points and coordinates

Our hope is that the content, activities, and pedagogical suggestions in this publication are of use to other activists and that these materials are amended and improved as part of a living, collective process. We want to frame our suggestions on how to approach these materials in a particular way. We live in a highly commodified culture which encourages us to simplify, homogenise and standardise human activity in every sphere of life. This tendency is so common as to be almost invisible: we are offered *12 Rules for Life*, *7 Habits for Successful People*, *The 48 Laws of Power*, *101 Ways to Whatever*. On and on it goes. There appears to be an endless stream of cut and dried advice on how to best do things in a cut and dried way. We do not want to imitate this habit: it is uncritical and anti-pedagogical.

As we have already mentioned, learning and pedagogy are highly complex activities which require a lot of careful contextual judgement, flexibility, and openness. We believe, above all, pedagogy requires a strong sense of educational and political purpose as well as a high degree of flexibility and openness. So, rather than present rules or fixed principles, we far prefer the idea of sharing with you possible departure points and potential coordinates[10] as the road you might take – either in a single session or long course – which cannot be mapped out precisely in advance. Critical and transformative learning is characterised by emergence and cannot be schematically preplanned. But it does require careful preparation and reflection. Below we sketch out nine interlinked points of departure and coordinates for travel and arrival in pedagogy: These are: 1) the importance of context in educational planning; 2) the value of experience; 3) the centrality of dialogue and linked to dialogue are the next three points; 4) the significance of the emotional and relational dimensions of pedagogy; 5) the sort of interpersonal values that support learning; 6) comments on politics and positionality; 7) why a multimodal and holistic approach to pedagogy matters; 8) the need for reflexivity in activist educational work; and 9) some final remarks on the direction and outcomes of movement education.

1. Context and the work of recontextualization

The material in this guide is the fruit of working with a wide range of activists over many years as well as the recent experience we have together in the MLC. The MLC sought to create a space where activists from diverse backgrounds and movements could "learn from each other's struggles". In this regard, the material here has been developed over time and across multiple contexts, but it is partial and incomplete all the same. The group you work with will be different from the ones we have encountered. Paying careful attention to this simple fact strikes us as one of the most important and most necessary things to say in a publication full of plans and activities designed to be taken up elsewhere. To foster movement learning we need to be able to step back and adapt in context rather than directly apply in a recipe like fashion. Pedagogy, by definition, involves the recontextualization of ideas, themes, and activities from elsewhere. Remaining alive to the specificities of this process – the making and remaking of knowledge – is fortunately something that does not take a lot of pedagogical experience to do, but it does require we dispense with the widely held idea that knowledge is fixed, static, and simply transferable.

2. Building on, and from, participants experience

A key idea for us is that learners bring an enormous amount of knowledge with them from their lives and activism. This is not a novel proposition. Building on, and from, lived experience has been a mainstay of progressive and radical education for over a century. For us, the needs and desires of participants, and focusing on the dilemmas and questions that emerge from their activism, are crucial elements in planning activist education. That does not mean we think all good education is exclusively experiential. In fact, it is our view that rich activist learning requires an *ecology of knowledges*, weaving between experiential, technical, scientific, historical, ideological, relational, aesthetic, organisational and critical forms of knowledge. But the departure point that allows you to

10. We imagine some readers might want something brief and less discursive. There are resources for educational planning – including a brief checklist – as well as tips on how to facilitate at the end of the publication. It may suit some of you to read this first and then come to these comments.

help create the right combination of knowledge for a specific group has, we are convinced, to build outwards from the lived experiences, insights, and puzzles of that particular group.

What is meant by experience and experientially-based education is not always clear conceptually or politically. After all, you are now as likely to hear this idea in a corporate training setting as in an alternative education initiative. In formal education the idea of experiential learning is commonplace but is often reduced to something as banal and flat as people introducing themselves at the start of the session, briefly commenting on what has been presented at some point during the class, or even in terms of trainers asking for "customer" feedback at the end ("so, tell me how was your experience?"). Outside of education, invoking personal experience as a mark of distinction, or as an unassailable justification for an attitude or belief, is now a staple of infotainment, the self-help industry, advertising, and all the varied and curious blends of these things we encounter on a daily basis. As a result, the idea of experience is becoming leeched of meaning. But abandoning the idea of experiential knowledge and learning altogether is not possible, so we want to be as explicit as possible about what we mean.

We view experience as the sedimented awareness and knowledge of the events and processes that have shaped us – both consciously and not – as human beings. It is not just a store of accumulated memories - a rag and bone shop of the mind and heart. Experience is more active and central to how we act and think in the present than this passive notion of experience allows for: it is the basis for how we orient ourselves and how we make meaning, and where we fail to make meaning. It is what underpins our beliefs and convictions. It is what pulses and makes questions genuinely really live and pressing.[11]

The latter point is especially relevant to pedagogy. Tensions, puzzles, dilemmas, and contradictions mark the point at which experience *exceeds* what heretofore we have consciously known or have been able to articulate. It also signals where experience *falls short* in the face of the demands of the present and future, where we encounter our limits in the face of the world: our failure, abjection, heteronomy, alienation, and where we discover the seemingly intractable gap between heady aspirations and hard reality. Reflecting on these questions and tensions is a source of critical exploration, insight, innovation, and transformative learning.

In a highly individualised, neoliberal culture, many of us have become accustomed to thinking about experience solely in individual terms. But experience is also social and collective. How we grasp our experience is mediated both through culture and context. It is also profoundly political: the collective experience of power from above and the experience of seeking to build power from below is a defining axis for any popular education effort. Interpreting experience in a popular education setting therefore demands a basic level of political lucidity about how power and counterpower operate. It calls for comprehension of the causes of exploitation, domination, unnecessary suffering and imposed silence. It seeks an awareness of where, and how, dominant power has been challenged and changed. Where we encounter the edges and limits of our understanding and/or the barriers to the projects of autonomy and political action, these are the collective socio-historical boundaries of preeminent importance in popular education. Grasping the interconnections between individual and social experience, and also where these experiences might be usefully disentangled, distinguishes popular and radical education from other forms of experientially oriented education.

One of the most significant tasks of a popular educator is identifying the questions, conflicts, dilemmas, limits and contradictions that are politically and historically significant in the group and which can spark deep critical reflection on activist practice. Proximity to practice and tracing the edges of practice is fundamental for activist education.

For us, experience is biographical *and* social. It is personal *and* political. It has conscious *and* unconscious dimensions. It is also dynamic, always being repro-

11. These comments are influenced mainly by Freire alongside Oskar Negt, Ira Shor and bell hooks, as well as theories of reflective practice (see resources in Part 4. Movement Learning and Popular Education). See also John Dewey, especially "Democracy and Education" (1916)

duced or transformed in the present. It is culturally and contextually mediated: experience is situated in webs of collective practice, and obviously in the MLC we are particularly interested in the highly sophisticated forms of human practice of social movements that support social change and transformation.

Building on and from experience of a specific group is a collective meaning-making process, puzzling through the needs and questions of that group, by that group. In approaching education in this way there is another implicit coordinate for our work that we want to foreground and make explicit now: the vital importance of promoting and supporting peer learning. When we speak about the centrality of experience, it is not just about interests, needs, questions, and dilemmas of participants, but also the existing know-how, insights, and capacities within the group. Repeatedly, participants on courses have told us that peer learning is key to good activist education. But this does not fall from the sky: mapping the capacities of the group *as a group* is something that requires active attention and support through pedagogical design. As well as considering how to do this in the activities detailed elsewhere in this publication, we also initiated what we call "action learning circles". These are peer-learning groups which explore problems and issues in practice. At the end of this educator's guide you will find *Educator's Resource 4: Action Learning Circles* which explains how we approached this in detail.

3. Research, the need to "educate the educator", and critical dialogue

If paying attention to context and lived experience are important departure points in pedagogy, what might this entail in practical terms? It means endeavouring, where possible, to get some sense of who is in the group and their needs, interests, concerns, and questions in advance of a session or training. There are lots of ways of doing this, ranging from informal conversations beforehand, through sending out brief surveys or questionnaires, all the way through intensive community consultations over months and even years (see Kirkwood & Kirkwood, 1989).[12]

For example, when we piloted the MLC learning resources in a year-long learning programme, we analysed feedback from activists across multiple trainings online and offline, sent out detailed questionnaires, followed by focus and induction groups with participants. Needs analysis was used in the design of group building activities online and in the residential trainings we held as part of the programme. To further draw out the experience in the room, we asked people to do a biographical piece about their activism ("stories of me") and asked people to prepare activist moodboards. We ensured there were plenty of opportunities for small and large group discussion, so that lived experience becomes visible and, much of the time, central in the programme. Through active listening and team discussion of the expressed and perceived needs and interests of participants, we identified things which would be generative to return to in later sessions (see *Part 4. Movement Learning and Popular Education of this guide, Module 1. Digging where you stand: Exploring the experiences of activist learning* for some illustrations of how this can be approached). There are many other ways of doing this such as the drama exercises detailed by Augusto Boal (2002), or methods such as photo voice (Luttrell and Chalfen, 2010).

Figure 5. 3. Participants in the Theatre of the Oppressed workshop presented by Augusto Boal in New York, 2008 (Source: Thehero, CC BY-SA 3.0).

12. If you are seeking to build a long-term community or workplace base for your efforts investing in this type of deep research is highly recommended.

Our belief is that pedagogy always involves this type of active, restless exploration. Having a deep curiosity about who you are working with allows you to build a more complex and layered picture of who the various participants are and how they stand in relation to the topics and themes you are exploring. When you are working with the same core group for some time a lot of the pedagogical work is in continually adapting material and activities to the needs, concerns, and questions of the group as they shift. Pedagogy entails negotiating boundaries on a constant basis through research on the group, the context, and the wider political horizon. It is constant learning – re-search – rather than simply imparting information or letting a process unfold without direction. This is something that the Colombian activist and educator Fals Borda, as well as Freire, both grasped with enormous acuity (see *Part 4. Movement Learning and Popular Education* of the MLC guide for references for a more detailed discussion of research and pedagogy). Pedagogy stems from curiosity and developing systematic ways of using that curiosity to know again and to know better. To return to an old but still relevant maxim you have to "educate the educators".

This orientation – pedagogy as research – helps you move between planned content and the pulse of interest in a group. Needs, questions, dilemmas, and even capacities are not static. The process by which participants' experience and various forms of information and knowledge are woven together is a critical dialogue. Dialogue has practical, relational, ethical, and political dimensions. In the next three sections we outline how we understand dialogue and pedagogy in relation to emotions, relationality, and group dynamics, as well as values and dispositions, power, politics, and positionality.

4. Learning and relationality

> "I think if I had to put a finger on what I consider a good education, a good radical education, it wouldn't be anything about methods or techniques. It would be loving people first." (Horton, 1990)

Sometimes the obvious bears repeating – learning is relational and the learning process necessarily involves feeling and emotions. As we know from everyday life, and from the work of neuroscientists such as Antonio Damasio (2006), head and heart are not separate: we think *through* our emotions and our feelings are essential to how we process information and act. Conscious learning, especially in formal educational settings, also has a set of emotional states which we pass through as a matter of course - boredom, frustration, deep satisfaction, and mild elation etc. Just think, for instance, of the last time you learnt a new skill which you found relatively difficult to acquire and the emotions and feelings that accompanied the various stages of learning that skill. We also know, both from our experiences as educators and wider research, that critical reflection on our core assumptions – those which define who and what we are - frequently produces very strong and often unpleasant emotions such as anxiety, anger, confusion, anger, and even self-loathing (Maälki, 2019; Mezirow, 1991). It also sometimes produces deep joy. This phenomenon is well known in counselling and psychotherapy circles but less commonly acknowledged in formal education which still tends to hold to the well-worn fiction that there is a tidy separation between thinking and feeling.

Alongside the hardwired cognitive function of emotions, the specific feeling states of conscious learning, and the emotional highs and lows of transformative learning, it is also worth bearing in mind the way activism and emotions are bound together. Many of the political activists we work with are involved in oppositional movements. To be, feel, think, and act "against the grain" has many benefits. It is, after all, the source of solidarity and profound critical knowledge of the world. But this also has psychic and emotional costs. As does giving sus-

tained and careful attention to social problems and inequalities. Looking with an unblinking eye at the needless destruction and damage that surrounds us can be hard to bear. On top of this, there is also the emotional impact of the direct and indirect experience of violence and repression which can be very severe indeed. In this period of polycrisis and deep uncertainty, and with the defeat and fragmentation of progressive forces in so many places, all these things can combine together and give rise to hopelessness and burnout.

Strong emotions may or may not surface at a given event or during a course, but the emotional state of individuals in a group is pedagogically significant. It is also worth saying that every group develops its own collective relational and emotional dynamics, its own affective gestalt if you like. The emotions individuals, including you, bring to a discussion and wider group dynamics determine, to a large extent, how close, or far, the group is from acting as a cohesive learning community. Feeling into this and working with the emotions of learning sensitively and flexibly is something that is acquired over time. Responding appropriately takes practice and a willingness to learn from mistakes, but developing this capacity begins by simply making an effort to take note of what is, or might, be happening. A quick debrief, or getting into the habit of doing a bit of reflective writing after a session, is a simple and easy way to pause and consider and give due weight to what transpired emotionally and relationally (see the planning and reflection resources below).

Working face-to-face, it is easy to discern when things are not working in a group. This manifests itself in fragmentation, tension, withholding, unease, boredom, frustration, stuckness, and unproductive forms of conflict. On the other hand, the energy, openness, and dynamism that characterises a group that feels secure, where ideas and feelings are shared readily, and which is capable of exploration and fruitful problem-posing, is equally easy to recognize. A working group in full flow has a real power which is accompanied with a palpable feeling of grounded hopefulness, at times even a "real utopia", however temporary and fleeting. If you are new to training and education, it is worth spending time noticing how and when a group falters or gathers momentum.

Becoming a well-functioning group does not happen automatically or immediately. One needs to be able to stay with trouble and doubts, explore tensions, and accept and work with frustration. Such feeling states are integral to group formation and non-trivial learning. Again, there can be no hard or fast rules. What is needed is a capacity to assess and judge where the group and individuals in the group are at and what might be a useful next step. Sometimes tensions and concerns need to be named, or even confronted, in order for the group to advance. Simply noting an issue can sometimes be generative and be enough to overcome a problem. But if a group gets stuck, or there are unhealthy interpersonal dynamics, it might call for a less direct intervention (such as reframing the group task). On some occasions issues are better handled by looking after an individual and keeping this separate from the group work. This aspect of pedagogy calls for both emotional sensitivity and communicative clarity. This is one of the reasons why we recommend people working in pairs in training so that you can check with each other how you think individuals and the group as a whole are doing.

The beginning of a learning programme, course, or workshop is especially important in laying the groundwork for an effective learning group. Nearly always someone is asking themselves "Should I be here?" They are wondering if this going to be pointless/difficult/alienating and they are asking themselves if there are people in the room who are like them, or at least who get them, and so forth. This remains important and maintaining informal and formal feedback mechanisms is the best way of ensuring that the group's relational and emotional dynamics remain, generally but never always, positive (see *Educational Resource 1: Practicalities and Planning* at the end of this guide).

5. Animating values, presence and attention

We think it is vital that educators cultivate a relational capacity that allows them to be fully present and genuinely attentive. When we asked a wide range of movement educators in interviews and focus groups what they thought was particularly important for good practice they nearly all highlighted relational

capacity. Attentiveness and openness, linked to active listening, were the things mentioned most frequently, but the educators also spoke about creating a sense of freedom, lightness, empathy, care, patience, kindness, gentility, humour, playfulness, trust, respect, compassion, authenticity, being non-judgemental and humility. These qualities and values are meant to be demonstrated rather than merely espoused or held – they are values in practice. We do not think it is useful to discuss these in a singular or prescriptive way as there are many ways of being receptive to others.[13] But we do want to suggest that it is useful for you to be explicit about which interpersonal qualities and values you might wish to foreground in pedagogy, as well as why, and how exactly, this might manifest your way of doing things. In the experience of the MLC team, care, curiosity, and humility seem to be most important to fostering dialogue and good group dynamics. As feminists (Kittay, 1999; Lynch et al, 2009) have pointed out, care is basic to human survival, development, and flourishing. Care in various forms is a precondition for learning, from our perspective. Curiosity and humility are important additions because they are directly related to how we know and create knowledge together. You may well have different terms of reference. The point here is to be able to name them and think about this.

6. Power, politics and positionality

Just as there are modes of presence and receptivity which we, and other educators, think are important to cultivate, we are also convinced that pedagogy requires thinking through the defining values of progressive movements – equality, freedom, and democracy. This is not the place for an extended treatment of these ideas, but no serious political education can take place without some notion of how your approach to pedagogy relates to these values and *also* how participants in a course make sense of these values. This is one element of the political lucidity that we mentioned earlier. On a basic level, it means having enough background political knowledge of ideologies, movement cultures, and repertoires of resistance to be able to articulate your own conception of these values clearly and to also be able to grasp how and why certain values are being brought to bear by others in exploring specific themes and questions. It also means having a precise analysis of what education can and cannot do for movements in spreading these values.

For us, equality means presuming full equality between human beings in any given context and acting on this presumption. It also involves figuring out how education can support mass political movements to advance towards greater equality in terms of resources, power and recognition. These two things are linked but are nevertheless different tasks. The way the struggle for equality is, or should be, linked to specific political strategies and ideologies is, as you would expect, always going to be a source of dissensus. Dissensus enlivens and deepens critical dialogue as long as the basic presumption of equality in direct encounter is honoured.

Freedom is a far less commonly discussed value on the contemporary left, but following Freire (1972, 1998) we view the desire to be free as a fundamental feature of human life and that radical education needs to tap into this desire. Education at its best is a practice of freedom as well as the critical exploration of the meaning of freedom as this relates to projects of autonomy both small and large. As with equality, the way we think about freedom in the here and now, and the way social and individual freedom is pursued and obtained over time, are worth distinguishing. The third value - democracy we link to the principle of active participation in decision-making processes across all social spheres, including in workplaces and community.[14] Education and training can be democratised quite directly, and even serve as laboratories of democracy. In movement spaces outside of institutions such as the MLC there is enormous scope for developing more democratic forms of education and learning.

13. This is why we are mentioning a finding from the MLC research rather than simply stating our preferred terms.
14. One of the weaknesses of the pilot year-long MLC learning programme was our failure to think through how to involve participants in course decision-making processes as a collective group. There was a great deal of consultation and feedback, maybe at points even too much, but we did not develop clear co-governance structures, and this is something we want to tackle in the next iterations of the programme.

There is a tendency in a great deal of political discourse, and within specific ideological camps, to focus on one, and sometimes two, of these values. But it is our view that all three are co-constituting values that are integral to our version of critical pedagogy. These are, to return to an earlier point, values in practice, which in the right conditions can make education and training genuinely prefigurative. A free, curious exploratory, democratic learning space is a remarkable and beautiful thing. We have experienced the joy and solidarity that participating in such a space can bring, and it can indeed prefigure the world as it should be. In this sense, the aspiration that pedagogy might be genuinely prefigurative is a wonderful coordinate, a North star for radical education. That being the case, it is a too great, and perhaps a self-defeating, burden to carry this as an expectation for every session or course.

On a different level, we also think it is incumbent on educators and trainers to pay careful attention to their own positioning in relation to major social axes of power (see *Educators resource 3: Reflection* at the end of this guide), examining our own "place in social space" and how this might relate to what we do, and what we know, and how we are perceived. Our training programs bring together people with a range of gender identities and sexual orientations; varying backgrounds in terms of race, class position, age, dis/ability, ethnicity, nationality, languages; and with differing levels of activist experience, distinct political and organisational cultures and traditions, local/regional/national histories, and so on. We imagine you will also need to work with diversity and differences. Being reflexive aboutpositioning involves an acknowledgement of differences but also an ongoing exploration of which differences matter in a given context. This means thinking through which differences are largely contingent and those which are activated and relate to systemic/structural hierarchies of power. These differences intersect to shape people's reality and their daily experiences of power in very profound, often troubling, and frequently traumatic ways.

We also know that differences are also read, interpreted, and named in highly varied ways within different organisations, cultures and movements. Questions of positioning, voice, and power are frequently important, often central, concerns of some participants' political work generally. For others, this is less central or, rarely, not in view at all. Handling this sensitively is one of the knottiest questions facing movement educators and has major implications for wider alliance building and enhancing strategic capacity. Our experience suggests that through careful dialogue we can create zones of encounter and tolerance that support learning across movements.

Practising this is not always a smooth process. For instance, there were disagreements within the MLC team in reading how power worked, particularly in relation to hidden and tacit aspects of power and privilege, in relation to gender, age and experience. This ties into broader movement debates about the value and limits of representational and identitarian ways of thinking and how this relates to power inside and outside a specific training.

Learners rightly demand transparency and integrity about positioning and power, and are sensitive to contradictions and exclusions as well as to gaps between stated intentions and actual practice. In our experience as the MLC team, we have participated in, and held, trainings where gaps and contradictions have been problematic. Most notably, but not exclusively, these related to the racialized forms of power. We have also witnessed learning over time, a willingness to remain in the room, and to respond honestly in evaluations – despite difficulties, risks and pain. We want, again, to highlight the need for careful, critical negotiation of these issues in context.

Practically speaking, this means critically assessing the team composition, format of an event, and possible activities and guidelines for the community in relation to power and positioning. Asking which groups, movements, and histories are central and which are rendered marginal, or even invisible, in course design and pedagogy is an important element of activist education.

In building a base for this we have learnt from the work of LGBTQ+ and feminists' work on safe and safer spaces in establishing the basic conditions for

dialogue. We have arrived at the conclusion that this is something that is best explored in a processual way through dialogue with a group. In designing the MLC, we asked participants what they needed as individuals, created a solidarity team and initiated a discussion about needs and basic requirements through discussion (what we termed a "brave space").

Even with a group where trust has been established as egalitarian, free, democratic hopeful and orientated to work, there's always moments and patterns that need consideration and sometimes intervention. There are obvious issues such as who speaks first and most often, and who is listened to, which are gendered, classed, and racialised. There are also specific modes of monological communication, common in traditional education, which close down dialogue. These are relatively easy to name and problematize, sometimes harder to tackle. Alongside this, there are also less commonly named habits of speech and thought which are very widespread, such as rigidity, dogmatism, and moralism, which also undermine genuine dialogue. These are often very subtle and linked to emotional dynamics rather than just explicit speech acts or behaviour. Responding to this productively is a delicate matter. As with more general blocks and issues discussed above, this can be dealt with in various ways. Shifting the group's focus or changing activity can work. Simply noticing this and bearing this mind in designing and adapting future sessions is frequently effective. Often inviting someone else in the group to comment on a topic is enough to stop someone dominating the discussion. If it is a recurrent pattern in (dis) engagement and communication - and especially if this is connected to wider inequalities - this needs to be named and worked through as a group. It can mean creating space for group caucuses in a programme or training.

7. Reflexivity, conviction, and radical doubt

We now want to link the comments above about positioning, dogmatism, and rigidity with the earlier remarks about flexibility and interpersonal and political values. We think pedagogy requires political passion and boldness – a desire for truly transformative social change and a certainty that in the right conditions it can happen. But this needs to be combined with epistemological modesty - that what we know is fallible, limited and partial, and often plain wrong. It means opening yourself to radical doubt and acknowledging it is hard to really grasp the shape of one's own experience, and even harder to comprehend the experience of others. It also means acknowledging challenges, failure and difficulties in pedagogy: it can be hard to deal with the confusion and difficulty of a group; and it is often hard to remain open and non-dogmatic. In our experience, the best way to deal with this is to systematically engage in collective and personal reflection on a regular basis through discussion with participants and peers and through reading and writing (see *Educator's Resource 3: Reflection* at the end of this guide for more detail)

8. Engagement and a holistic, multimodal pedagogy

The discussion thus far has been quite serious. While we do take pedagogy seriously this is far too one-sided. We certainly do not want to suggest laughter or irreverence are not part of pedagogy – they are vital. Nor would we want to create the impression that poetry, fiction, dance, theatre, music and making things are somehow marginal or irrelevant to popular education - they are central. If you look through the MLC guide you will see we have sought to use multi-modal, holistic and varied learning activities including drawing, walking outside, responding to poetry, theatre exercises and watching videos. It would not make educational or political sense to do otherwise.

We also try to make sure there is space and time for real engagement. One of the things that we see very often - including in our own practice - is that there is a mismatch between the time available and the ambitions and objectives of a particular course or session. It's crucial to decelerate time because so much of activism and, of course, wider social relations is characterised by a sense of acceleration. In saying this we do not want at all to deny the urgency of political action but rather recognize that there are specific temporal conditions for rich

learning. Critical thought often involves a break, which involves taking ownership over our own time (Alhadeff-Jones, 2019). With regard to this, we need to be mindful how individual rhythms of thinking and learning can be meshed with wider collective rhythms without subordination. This may sound quite abstract but it's a very common to hear people say things like, "I really need a break… it takes me time to digest things," or, "I just need time to decompress and be away from people". At the same time, others in a group build and accumulate energy from contact and exchange and will say "we are only getting started!" and so forth. Neither of these things are wrong. They simply exist as one of the complexities of supporting a group. When there is time, when the basic conditions for critical dialogue are in place, when the heart and head are engaged in varied ways, we arrive at, to use a phrase of the Serbian adult educator Maja Maksimovic, a type of "spaciousness" in thinking and feeling.

For example, in the residential trainings we held as part of the MLC, we attempted to decelerate time by developing a schedule that valued the breaks during the programme as much as the programme itself. By offering long breaks, "morning awareness" activities such as meditation, making time for engaging the body after lunch, like a walk, dance, or sports, as well as for unstructured time to deepen conversations among participants that were sparked during the training. We also tried to make the training space a "digital detox" space where participants could focus on the here and now and not be constantly distracted by their devices to give attention to our shared explorations and to create a sense of spaciousness.

9. The pedagogical horizon, critical reflection and producing knowledge for social transformation

Figure 5. 4. Photo of James Baldwin in Hyde Park, 3.0).
London, 1969 (Source: Allan Warren, CC BY-SA

> "What societies really, ideally, want is a citizenry which will simply obey the rules of society. If a society succeeds in this, that society is about to perish. The obligation of anyone who thinks of himself as responsible is to examine society and try to change it and to fight it — at no matter what risk. This is the only hope society has. This is the only way societies change." (Baldwin, 1963)

Advanced activist learning takes many forms such as honing analytical skills, developing shared visions and strategies, augmenting knowledge of the history

of struggles, coping with defeat, and planning for victory. It is, of course, possible to think of these, and many other topics, simply as discrete areas of interest and to hold episodic sessions without having to consider what you might want to achieve beyond having an engaging discussion. However, it is impossible to work regularly in movement education or design a full course without giving some thought to what it is you think can and should be achieved through longer arcs of movement learning and education.

In the project we have tried to identify those things which are simply best learnt through activism directly (see also *Part 4. Movement Learning and Popular Education* of the MLC guide)[15] or are already well served by movement education. The resources and activities are underpinned by a conception of the sort of learning we are especially interested in supporting. It is learning that helps people approach their personal and political experience in an integrative way, builds networks of care and solidarity, and leads to critical reflection of assumptions which allow for higher levels of emotional and intellectual discrimination and analysis and which strengthens reflexive agency.

The MLC guide and our version of pedagogy seeks to work with an ecology of knowledges which are combined in varied and somewhat unpredictable ways according to the context. We have no issue with acknowledging the need for specialised and even highly technical knowledge, be that from natural science or political and social scientific concepts. Imagine fighting Shell in Nigeria or Ireland without recourse to detailed scientific knowledge on the environment? Consider being part of a housing action group in Manchester, Berlin or Belgrade without some understanding of the workings of the political economy and the state? Pedagogues either directly, or through collaboration, need to draw upon and use a variety of knowledges to read the world politically, including formal, technical and propositional knowledge. What is not acceptable, and this links directly to earlier comments on experience, voice and positioning, is overlooking the needs and questions of a group or approaching education in a way that thoughtlessly reasserts traditional hierarchies of knowledge and communication.

This also means understanding dialogue as a multistranded phenomenon that can be supported by many possible formats. Dialogue is not the same as open discussion. But it is a collective movement of group learning which allows for the reconstruction of experience through exploration and social and political analysis (see *Part 4. Movement Learning and Popular Education*, *Module 4. Dialogue and research in movement learning and education*). What is needed is care and attention to how a dialogue moves between theory and practice, between experience and curricular materials, between aim and process, and between the political horizons of the learning group and the wider movement landscape over an extended period. The aim is to seek to maintain energy in this process and to foster significant and potentially transformative learning. This is, to come back to an earlier point, why we think proposing fixed rules is so misleading. This requires taking different roles as a facilitator at different times, highly directive at one point and acting solely as a listener at another in order to think how a dialogue can fruitfully move between cathartic and exploratory discussion, between analytical and critical learning (see *Educators Resource 2: Facilitation* at the end of this educators' guide).

In the MLC design and pedagogy we use a version of the Action Learning Cycle (see Figure below). The basic idea underpinning this model is that critical reflection on experience involves a movement of attention from the concrete to the abstract and from the abstract to the concrete. It must draw on embodied, experiential knowledge as well as theoretical and conceptual tools to problem-pose and problem-solve. This results in action of various sorts. The figure is a necessary simplification. Learning in a group is messier and multidirectional. You need to situate what is happening in a context and in a group and once you start mapping this in situated activity systems it looks far more complicated.

15. A lot of movement learning is organic and comes about simply through day-to-day encounters with other activists whether this is skill acquisition, the sharing of insights, or shifts in perspective and practice. Incidental and informal learning can be very deep and rich and deserves to be noticed and celebrated, but it has its own rhythm and logic. Coming up with a poster design, using company records to find out who owns property or a business, or learning the practical meaning of solidarity through direct action, or seeing how someone defuses conflict through humour at a meeting, are all examples of this but are not usefully learnt through activist education and training. See Part 4. Movement Learning and Popular Education for a further background.

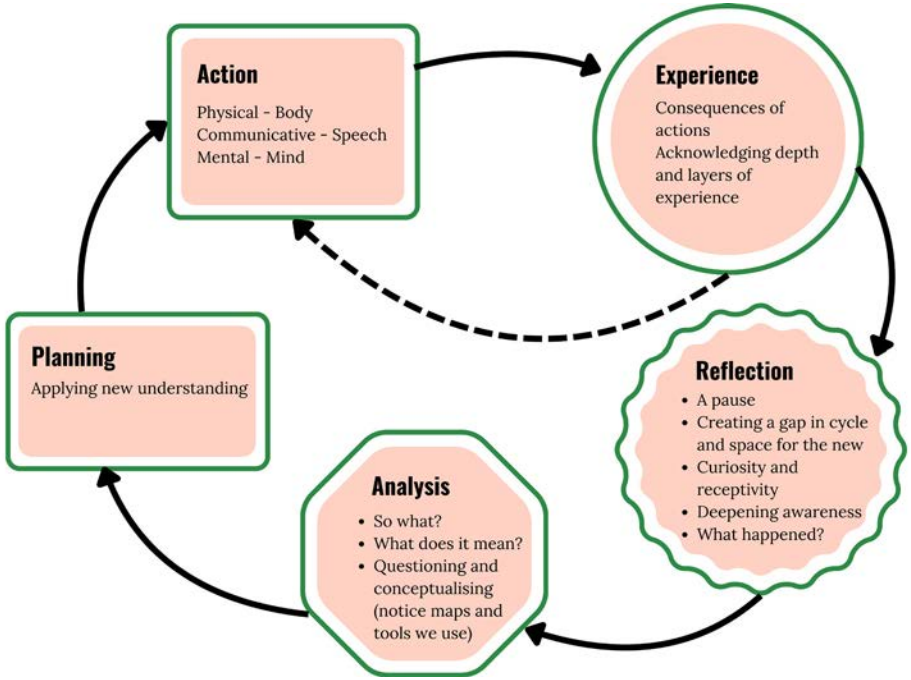

Figure 5. 5. Action Learning Cycle

It is worth saying the Action Learning Cycle and the earlier arguments made about the value of experientially rooted, integrative, critical reflection in support of enhanced agency are not meant to be prescriptive. It is about having an orientation for planning and assessment.

Participants pick up on, and take away, different things from a session - a tip, a remark, a hug, a practice, a new idea, an insight into what makes them tick, and sometimes nothing at all. That is how it is, and should be, but as an educator you do need a model of critical knowledge and learning - a political-pedagogical horizon if you wish. Decisions about mode of facilitation cannot really be made in an informed way unless you have a sense of what critical reflection is and looks like and the specific forms it might need to take for political and pedagogical reasons. The resources section at the end of this guide will help you develop this horizon as might some of the material in *Part 4. the Movement Learning and Popular Education* in combination with sustained thought and study.

There are significant pedagogical challenges when a group is brought together to learn *across* contexts. That means that we can't simply try to find or create, let alone impose, a single language that works for everyone but rather try to create bridges across an ecology of knowledges, experiences, and practices. This can lead to profound learning - a double movement of affirmation and decentering accompanied by a kind of reflexive turn. Arriving at a shared horizon for our work was very time consuming and challenging. For example, during the year-long programme part of the MLC, we became more systematic about analysing the constellations of themes and questions in the group and how this could be represented back to participants as the course proceeded. However, we did not manage to support the production of many texts and artefacts that could be disseminated beyond the programme. It is one the areas where we want to expand on the MLC tools and practices and adopt those used elsewhere in the future.

The strategic learning projects: an example of some of these issue in practice

Strategic Learning Projects were set up as a core learning activity part of the year-long programme held as part of the MLC. These were facilitated action-learning groups set up to explore and develop learning in relation to specific, concrete, and strategically relevant challenges facing the participants in their organising and social movement work.

After reviewing the course themes we set up multiple groups of 3 to 7 people focused around a shared and specific inquiry. These were meant to be focussed on an existing project participants were already working on, or on a shared problem which other participants also face in similar ways. These groups were accompanied by one or two team members in a facilitated version of the action-learning process. In addition to supporting learning about the specific challenges faced by activists, we intended that the process supported the development of action-learning skills and helped activists to embed them within their ongoing practice, both individually and organisationally.

The SLPs created space for rich and in-depth conversations – some of the richest on the course, precisely because people were coming from diverse movements. But the multiple contexts meant that moving towards action proved difficult. Some of the SLPs floundered as they could not find the time or shared ground for planning action. We responded in several ways to this. In some cases we chose to disband. In some groups we decided to primarily act as active listeners and create space for reflection and catharsis. In others experiences facilitation became more directive to create boundaries to the discussion and sought to support activist theorising which was critical and has explanatory depth.

Many, many hours of small group discussion took place in the SLPs during the year-long course. Participants expressed that it was helpful in deepening their reflection, critical analysis, and planning in relation to the challenges they were facing and often directly useful for their activism, although it is difficult to assess the extent to which it contributed to transformative learning of the organisations and movements of which the participants are a part.

In place of a conclusion

In this guide, we embarked on a journey driven by the recognition of the historical moment in which we are currently living, characterised by intersecting crises across social, political, and environmental realms. The prevailing neoliberal paradigm has led to stagnation and inequality, while systemic injustices persist in the forms of racism, patriarchy, and ecological degradation. In the face of these challenges, the need to build movements with the power and scale to organise for systemic change has never been more pressing.

However, the path toward effective collective action is limited by the fragmentation and divisions within and between movements, by the lack of long-term strategic capacity, and capacity for reflection and embedded learning in movements. These challenges impede progress and limit the potential for collaboration and alliance-building toward systemic change.

The Movement Learning Catalyst (MLC) guide was developed to strengthen movement infrastructure, address some of these challenges and the learning needs of activists and organisers in navigating the complexities of the contemporary movement landscape. It is composed of a collection of curricula for movement building, strategizing, and learning based on insights from our diverse experiences and perspectives. The four parts in the MLC guide include frameworks, tools, and practices focusing on various dimensions of movement organising: from transversal organising and the ecology of social movements to transnational and translocal organising, from strategizing to movement learning and popular education.

In particular, this educator's guide is dedicated to those of us who use our experience as activists and organisers to act as educators in our organisations and movements, supporting learning processes, and developing movement practices. We aimed to support the ability to contextualise and use the MLC curricula and learning resources to develop learning programmes for our groups, organisations, and movements based on all of our needs and experiences. Throughout

the guide, we shared pedagogical principles and practices for movement learning inspired by radical popular education, such as contextualization, drawing upon participants' lived experiences, critical dialogue, relationality, reflexivity, and radical doubt. We suggested using a holistic, multi-modal pedagogy, and invited educators to engage mindfully with power dynamics and positionalities within learning spaces.

We are not in the position to offer a definitive conclusion. How could we? The work is ongoing and will develop in iterative cycles. We are still learning how to sustain and build upon the MLC and we view this guide as a step in the journey of movement learning. As Paulo Freire noted, education is a perpetual process of becoming – an ongoing dialogue with an ever-evolving reality. In his words, "Problem-posing education affirms men and women as being in the process of becoming – as unfinished, uncompleted beings in and with a likewise unfinished reality" (1972, p. 65). With this ethos guiding our commitment to a more just and equitable world, we continue the quest for systemic change, knowing that our work is both vital and unfinished.

Educators' resources

Educators resource 1: planning and practicalities

This resource includes information on planning learning programmes, with a template for session design, a check-list for preparing for a session, a sheet for self-assessment, and suggestions for gathering feedback and for further reading.

Educators resource 2: facilitation

This resource includes a sheet explaining do and don't in effective facilitation, an overview of modes of facilitation and links to resources on facilitation.

Educators resource 3: reflection

This resource includes notes on critical reflection and activities and resources related to power and positioning as well as exercises and suggestions on how to support reflection on pedagogy and references for further reading.

Educator's resource 4: Action Learning Circles

This resource offers a guide to Action Learning Circles as practice of peer-to-peer learning to support reflection from experience. It includes information sheets on how to establish and facilitate action learning circles and in your learning programme or in your group.

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To learn more about the Movement Learning Catalyst learning resources, visit www.movementlearning.org

Appendix

APPENDIX

Here's the full list of learning resources mentioned in the guide:

Part 1. Transversal Organising and the Ecology of Social Movements

- Adams, N. (2019). *Ecologies of UK Social Movements.*
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