
Movement Learning Catalyst
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

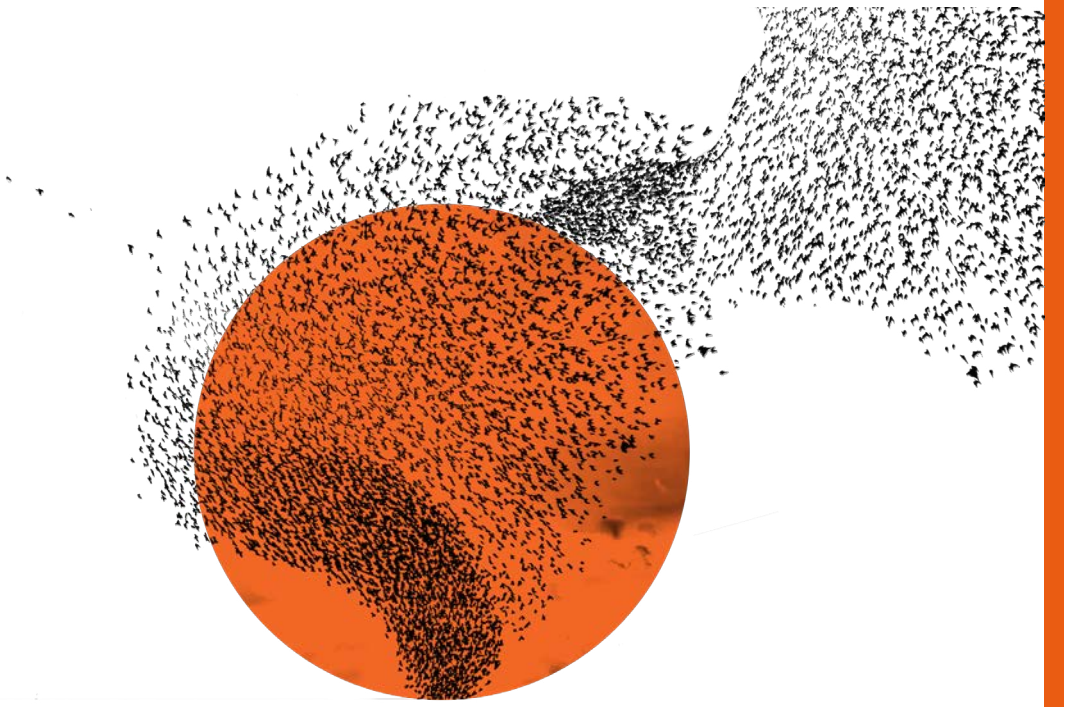
- Describe the six steps of the Strategy Cycle for strategic planning
- Embrace vision and values in shaping long-term goals, cultivate radical imagination, emotional intelligence, and flexibility for adaptive strategizing
- Analyse the context with tools such as SWOT analysis, movement mapping, and 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

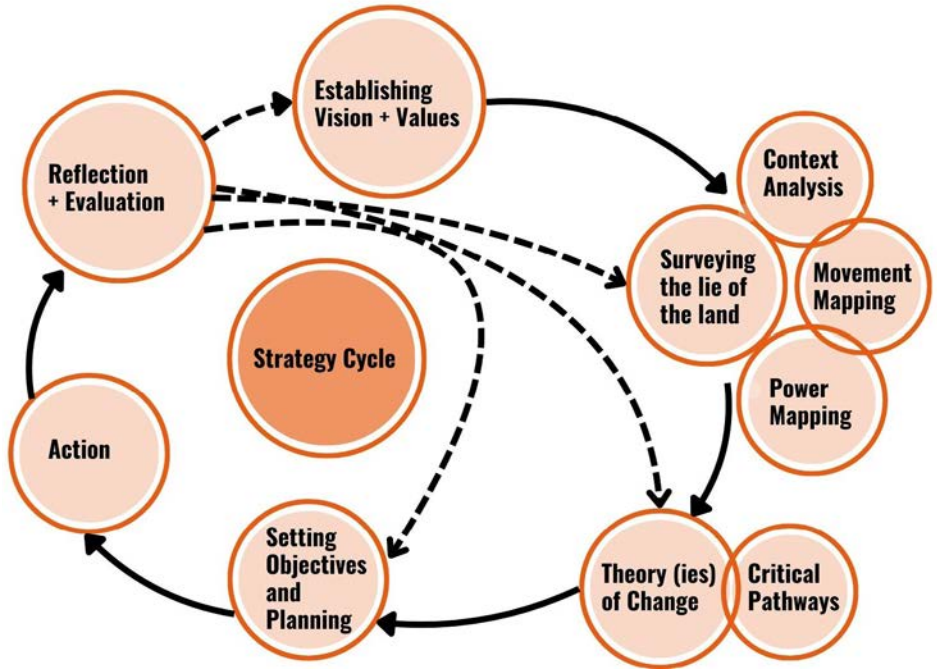


Figure 3. 1. Strategy Cycle by Ulex Project

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.

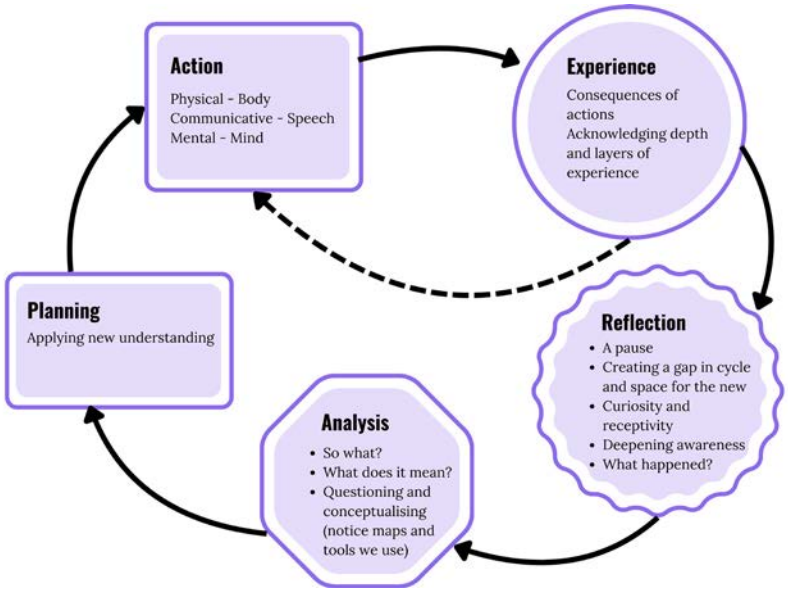


Figure 3. 2. Action Learning Cycle

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)

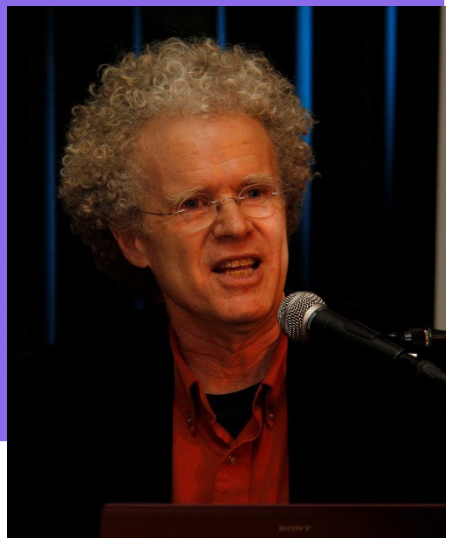


Figure 3. 3. Erik Olin Wright, Berlin, 2011
(Source: Rosa Luxemburg-Stiftung, CC BY-SA 2.0)

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

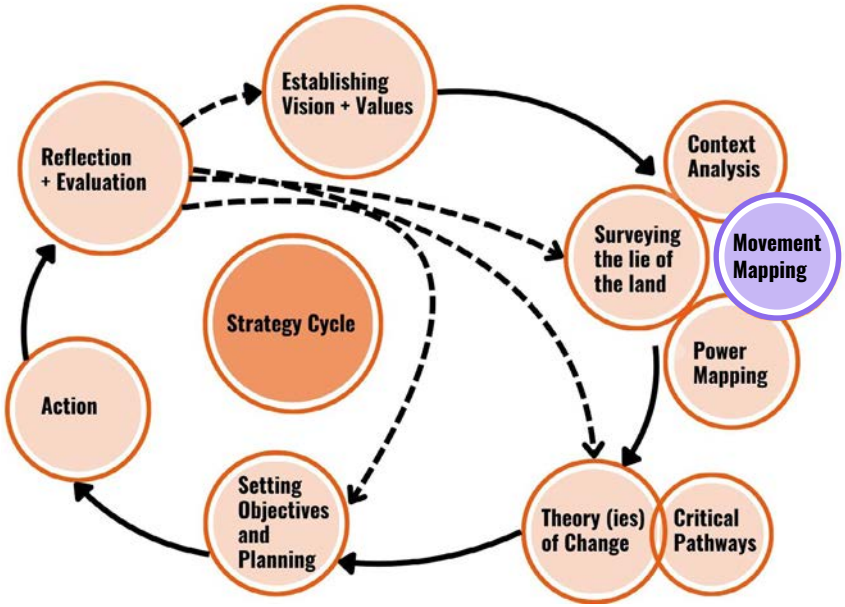
some of the relationships between them in terms of power and influence. The following modules will unpack context analysis and power analysis, here we'll briefly look at movement mapping.

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:

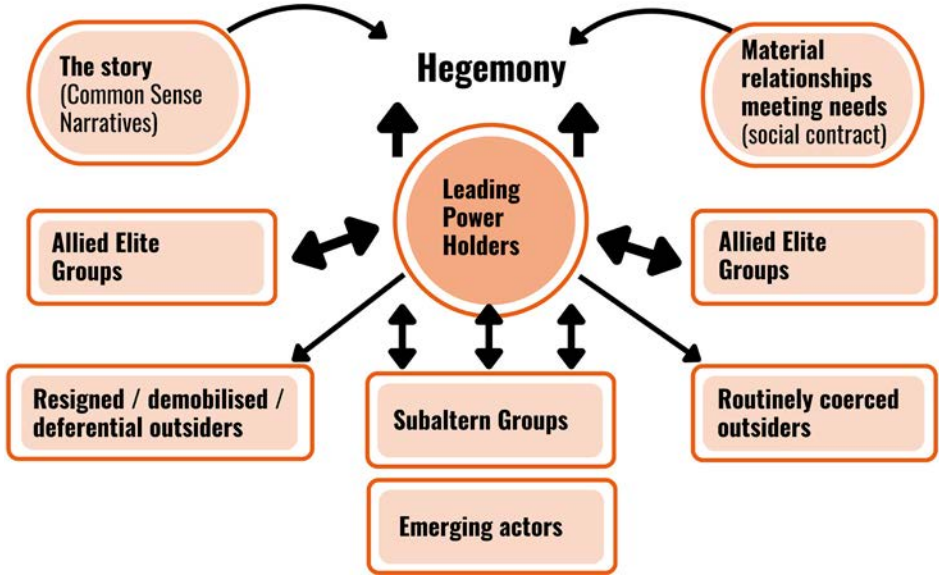


Figure 3. 6. Mapping Hegemony by Natasha Adams (2024)

"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:

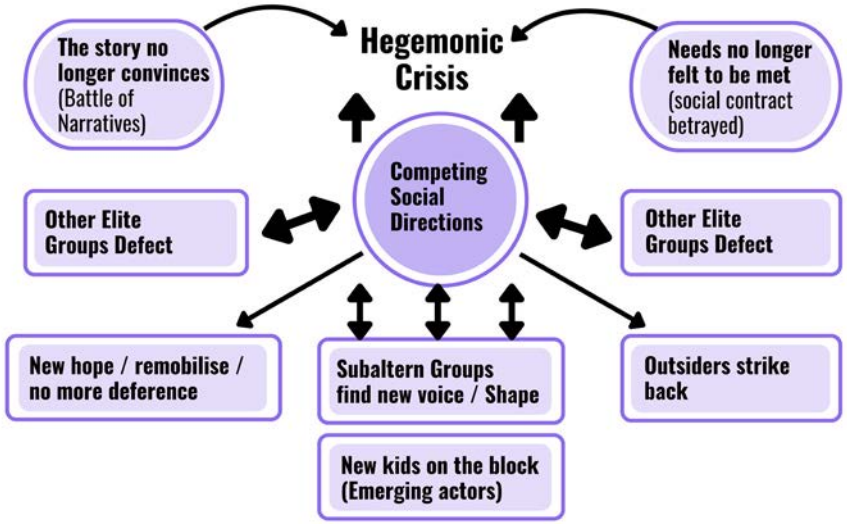


Figure 3. 7. Mapping hegemonic crisis by Natasha Adams (2024)

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.

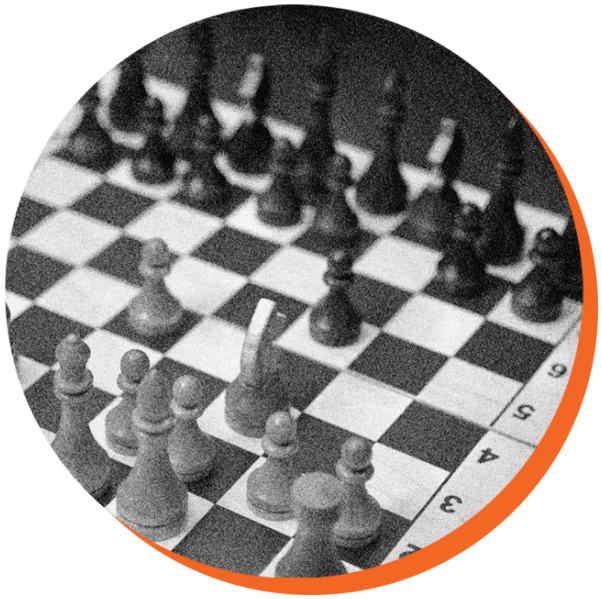
Learning Activities

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.

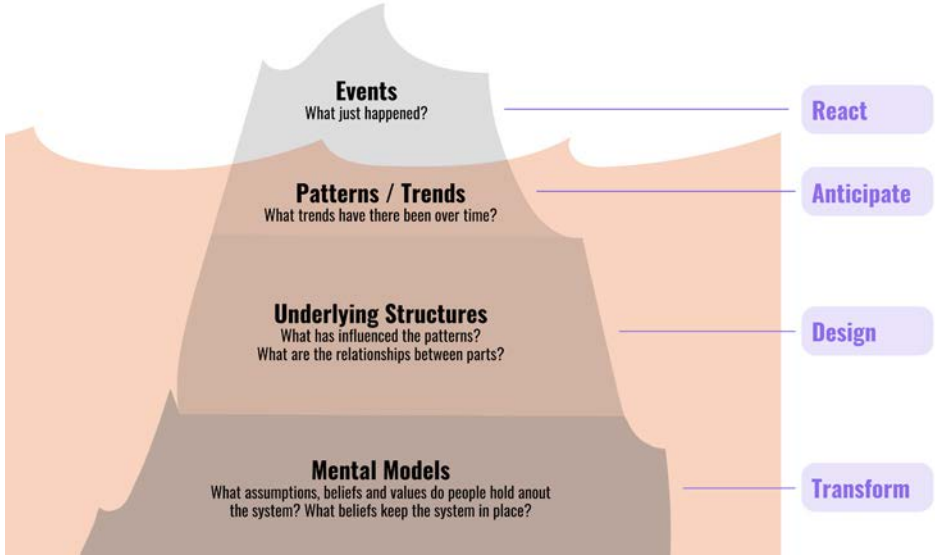


Figure 3. 9. System Thinking Iceberg Model

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

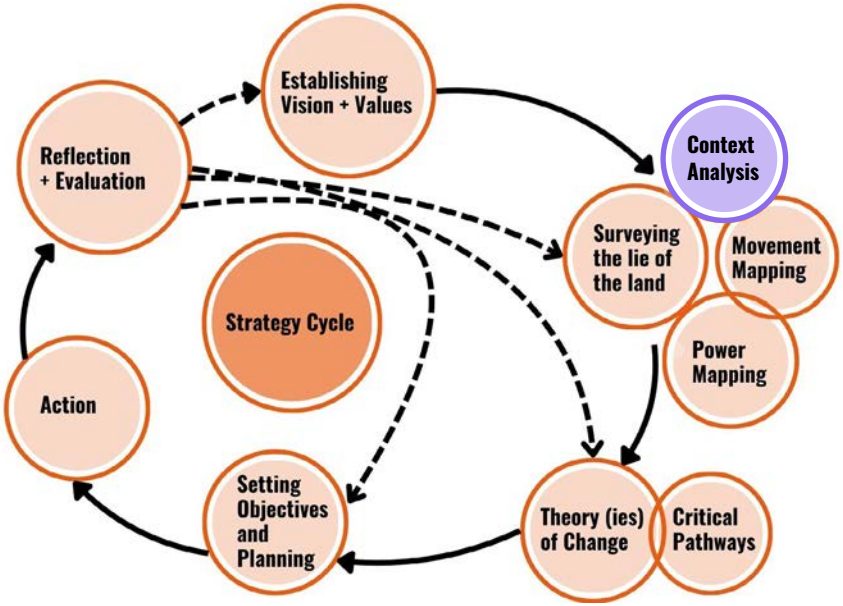
This activity supports participants to apply the scenario planning framework to context relevant to them. It should be closely facilitated and is a useful way for people to learn how to avoid some common pitfalls encountered using the method.

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.

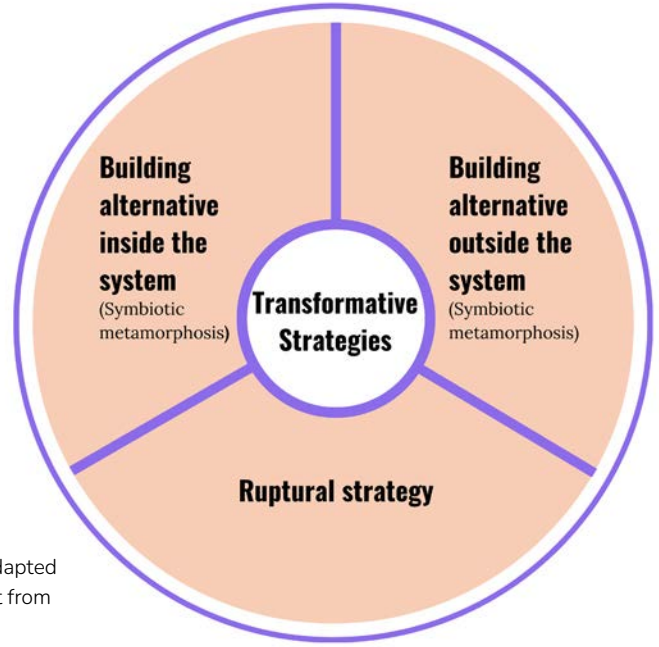


Figure 3. 11. Transformative Strategies - Adapted by Ulex project from Wright (2010)

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

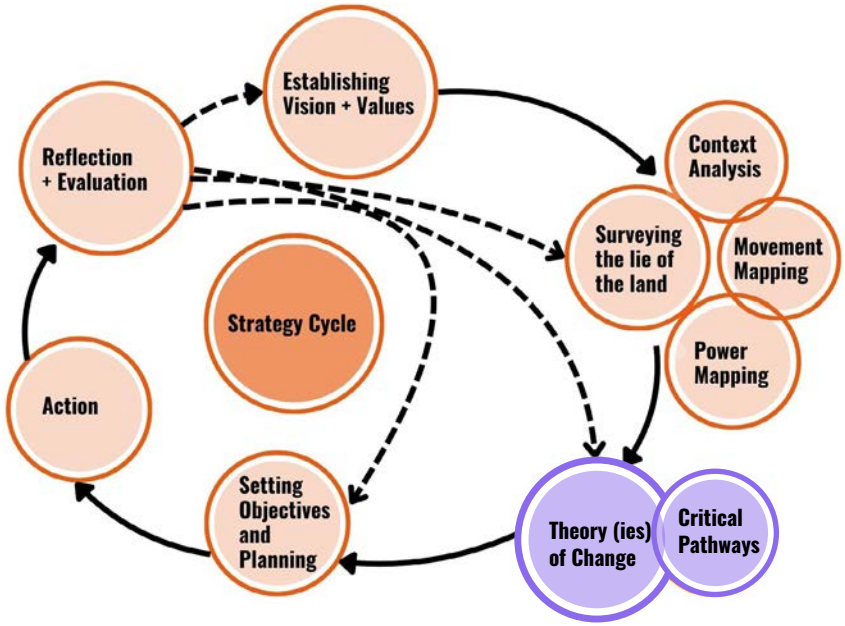
This activity breaks down the demanding and complex process of developing a theory of change into a clear set of steps. It enables us to synthesise the analysis and surveying we've done already, into a clear pathway of necessary changes in a way that challenges magical thinking and can help us to bear 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.

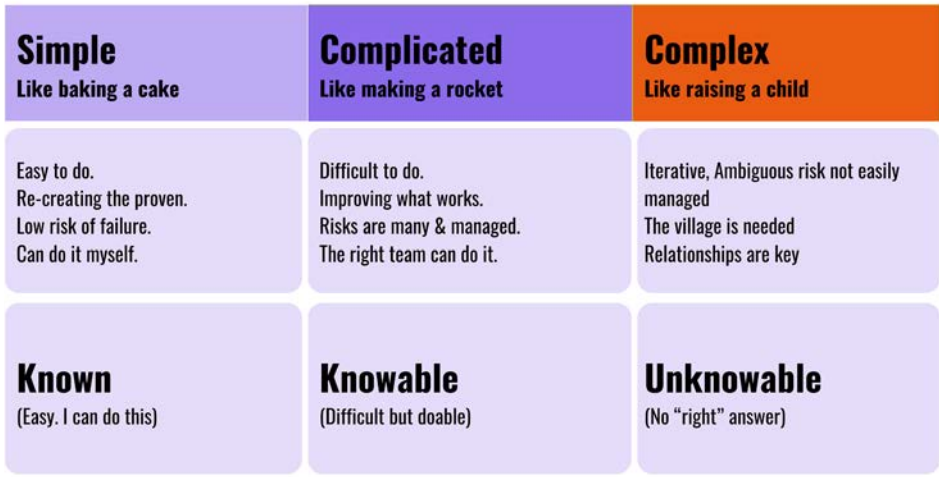


Figure 3. 13. Simple, Complicated and Complex Problems, adapted from Glouberman & Zimmerman (2002)

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

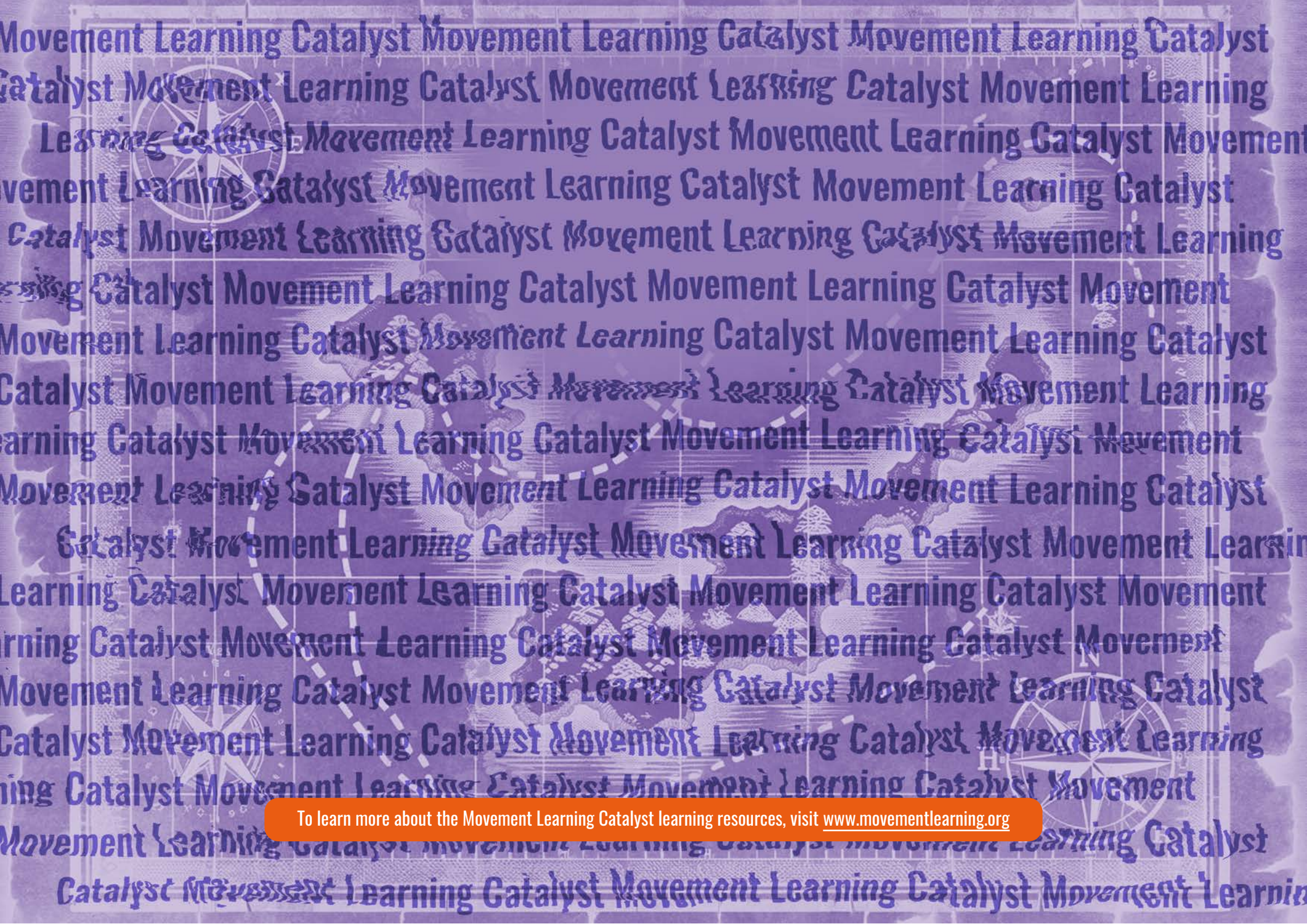
This learning activity guides activists through developing relational movement maps to understand network dynamics. It introduces network theory concepts such as density, centrality, homophily, and multiplexity. Participants reflect on patterns of connections, strengths, and weaknesses in their networks, 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.


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