Everything in Moderation?: An Analysis of Foreign Policy Moderation in Left-wing Political Parties

by

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Dalhousie University is located in Mi'kma'ki, the ancestral and unceded territory of the Mi'kmaq. We are all Treaty people.

DEDICATION PAGE

This thesis is dedicated to Le Vi Pham. Although I predicted you'd cringe when I told you about this dedication, I hope you know that your presence has been invaluable to me.

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ABSTRACT

Moderation, the shift in parties' positions towards consensus, has an impact on the range of democratic choices facing voters. For foreign policy, traditionally not a feature of domestic politics, moderation raises certain theoretical and empirical questions. What structural or institutional factors encourage moderation in this area, even for ideological parties? Looking at fifteen left-wing parties across the Global North, we examine whether international factors and/or domestic factors impact the moderation of their foreign policy positions. Methodologically, our study takes the form of a qualitative comparative analysis. Using insights from the cartel party thesis and Marxist IR, we examine how party strength, intra party democracy, public subsidies to parties, a transnational economy and security integration may combine to influence the decision to moderate. We find that there is no definite pattern explaining moderation in foreign policy across all examined cases but find several patterns suggesting the need for further research.

LIST OF ABBREVIATIONS USED

CCF – Co-operative Commonwealth Federation

CDU – Christian Democratic Union

CSDP – Common Security and Defense Policy

CMP – Comparative Manifesto Project

CSDP – Common Security and Defense Policy

ECFP – Political Accounts and Financing Entity [Portugal]

ESDP – European Security and Defense Policy

IPD – Intra Party Democracy

IU – United Left

JCP – Japanese Communist Party

LDP – Liberal Democratic Party

MPD – Manifesto Project Database

NATO – North Atlantic Treaty Organization

NDP – New Democratic Party

PCP – Communist Party of Portugal

PDS – Party of Democratic Socialism

PfP – Partnership for Peace

PPDB – Political Party Database Project

PS – Socialist Party

PSOE – Spanish Socialist Worker's Party

SAP – Swedish Social Democratic Worker's Party

SF – Sinn Fein

SPD – Social Democratic Party

SV – Socialist Left Party

TCC – Transnational Capitalist Class

TDI – Trade Dependence Index

TNI – Transnationality Index

UNCTAD – United Nations Conference on Trade and Development

WASG – Alternative List for Employment and Social Justice

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CHAPTER 1 - Introduction: Why Moderation? Why Foreign Policy?

When citizens go to the polls in liberal democracies, they are expressing their preferences for government formation and policy options. However, voting is not an unmediated experience. In functionally all liberal democracies, the political party is the organization that mediates between the voter and the government. To compare politics to cooking, voting is more like deciding between franchises or local restaurants than cooking – options are limited to what is on the menu. As a result, the question of the breadth of the range of democratic choices has strong normative value. Moderation, the convergence of policies towards consensus, or a status-quo position, is therefore an ambiguous phenomenon, despite its conventionally pleasant ring. Moderation necessarily decreases the range of choices available to voters as parties converge on policies. This begs the question of why moderation happens; is it a function of voter choice or the result of other forces in or structuring society?

This question comes into focus when we discuss the moderation in foreign policy. Traditionally, politics is seen to 'stop at the water's edge'. The anarchic nature of 'the international' limits what policies and positions can be taken by governments. There is no choice for citizens. However, this sharp distinction between domestic and international politics has been challenged by scholars, noting there is some mutual influence, even in the realm of party politics (Joly and Dandoy 2018; Raunio and Wagner 2020). However what shapes these interactions – the structural nature of international relations or domestic institutions? Furthermore, what would cause moderation in the foreign policy sphere – would it be a mix of domestic and international conditions, and would they be institutional or structural factors?

One attempt to explain and predict structurally caused moderation (traditionally) on the domestic level is the cartel party thesis, a proposed party type first described by Katz and Mair (1995). Part descriptive and part explanatory, they argued that parties are increasingly being delinked from society and becoming integrated into, or dependent on, the state. This process describes and expects several mutually reinforcing phenomena. Chief for us is the process of moderation and convergence on policies, as parties become agents of "efficient and effective management" (Ibid, 19). Parties become increasingly dependent on state subsidies as their connections to civil society shrink, and parties become more centralized and professionalized (Ibid, 18-19). For Katz and Mair, this process is the latest development in a semi-dialectic chain of party evolution (Ibid, 6). Just as parties of elites or mass movements evolved to appeal to the broad electorate as the advance of the welfare state shrunk class based social divisions, the cartel party is theorized to be the result of the increased expense of campaigning and atomization of social life, breaking the bonds that held parties and citizens together (Ibid, 8-15, 20). We can take the more concrete elements of this arrangement, public funding and changes in party structure, to see if they are associated with moderation in line with the thesis.

The cartel party thesis promotes a view in which the changing structures of society lead to state-party linkages and cooperation (or cooption). In this view, moderation is the outcome of a de-politicizing of the political sphere, of the triumph of managerialism prompted by shifts in the economic, technological, and social structures of society. If this is true, then moderation is not the choice of citizens and voters but forced upon citizens by the structure of society itself. It would also challenge more institutional views of moderation; that moderation is shaped by country-specific institutional factors

and the contingencies of electoral politics (Cox 1990; Ruparelia 2006). Not a Marxist theory, albeit with dialectical elements, the cartel party thesis reminds us of similar Marxist critiques and stances. Gramscian IR asserts historic power blocs promote consensus through hegemony (Pasha 2008, Jonathan 2008). Some like Robinson (2010), suggest that national politics in the international sphere are being increasingly influenced by a well-connected transnational capitalist class (TCC) protecting their common interests. This in turn promotes a common foreign policy of regulation and enforcement through joint security incentives (Klassen 2014). From a Marxist perspective, such international imperatives would encourage parliamentary left parties to compromise their ideals and accept the international consensus if they hope to govern. Context-specific institutional factors can be identified and challenged with a change of institutions. If choices are constrained by structural forces, and one does not like the options, then the only options are resignation or a radical and revolutionary stance against the make up of society.

From a practical perspective, by marrying these perspectives together, the Marxist TCC IR perspective and the cartel party thesis, we can attempt to answer our main question; what international or domestic factors encourage parties to moderate their positions, particularly left-wing parties? By framing this question with these theoretical perspectives, we can also approach this question from the frame of whether moderation is forced by structural forces, as opposed to being encouraged by institutional factors or merely by the dynamics of domestic politics. Several more academic questions also naturally sprout from our more politically minded critique; has there been moderation in foreign policy among left-wing parties? Can this be explained by overarching structures

and the elite forces they empower or is this process more context dependent and shaped by national characteristics? Can we approach these interactions from a comprehensive paradigmatic perspective?

Unfortunately, the issues we have raised here are multifaceted and complex. Therefore, our research in this study will form the base steps of a multi-step research program. Here we are both descriptively attempting to see whether there is moderation in foreign policy positions and testing how well our theoretically informed explanatory conditions and variables work to suggest mechanisms of moderation in foreign policy. We hypothesize that a mixture of domestic and international factors such as high integration into a transnational economy and security alliance system, combined with a strong and competitive position within the party system, high levels of public funding, and low levels of intra party democracy contributes to moderation. We expect to find consistent patterns across our cases, indicative of a more structural perspective. Future steps in this program will involve in-depth case studies to identify mechanisms behind our identified structural and institutional conditions.

Our study will proceed as follows. The second chapter will discuss our overview of the literature and our research design. The third chapter will discuss the six conditions that will be examining through our QCA analysis. The fourth chapter will be dedicated to introducing our cases in the context of the condition operationalizations introduced in the third chapter. We are examining fifteen case parties and eight case countries: Canada and the New Democratic Party, Japan and the Japanese Communist Party, the United Kingdom and the Labour Party, the Irish Labour Party and Sinn Fein in Ireland, the SPD and Die Linke in Germany, the PSOE and IU in Spain, the PS and PCP in Portugal, the

Norwegian Labour Party and Socialist Left Party in Norway, and finally the SAP and Left Party in Sweden. The fifth chapter will discuss the construction and results of our QCA analysis. In our concluding chapter, we will discuss the key takeaways from our results, namely the nature and existence of moderation, the theoretical implications, the limitations of our study and finally, discuss avenues for future research.

CHAPTER 2 –Literature Review and Research Design

While we have touched briefly on our research questions, hypothesis, and theoretical perspective in the previous chapter, the exact nature of our study is still left unclear. In this chapter, we aim to do two things. Firstly, we will describe the debates within the scholarly literature touching on the relationship between domestic and international politics, the relationship of political parties and foreign policy, and Marxist IR debates to situate our study and its choices within the scholarly framework. Secondly, we will describe qualitative comparative analysis, explain our choice, and lay out how we will use it to examine the factors influencing foreign policy moderation.

2.1 – The State of the Debate

Our research is situated within an emerging area of scholarly research; the connection between political parties and foreign policy (Raunio and Wagner 2020, 515). Often this is in the context of government or parliamentary participation, particularly studying the impact of coalitions on policy formation (Joly and Dandoy 2018; Legasse and Mello 2018). While including elements of party ideology, these studies have a strong focus on government as the main connecting point between the domestic and the international. At the most, this literature incorporates non-governing parties through the lens of executive and legislative interaction, leaving room for non-governing but competitive parties to have an impact on foreign policy. However, recent work by Chryssogelos (2021) has expanded this focus from parliamentary contestation to electoral contestation by focusing on the effects international events have on domestic political contestation. This developing interest in parties is part of a broader trend of investigating the connections between foreign policy/IR and domestic politics (Raunio and Wagner

2020). Aldrich et. al (1989) argued that foreign policy positions were a concern of voters and could be activated by presidential candidates These studies have taken different forms. Rathbun (2007) examined reasons for correlation between domestic and foreign policy attitudes among American elites, arguing that they can be explained by beliefs correlating under the broad categories of 'hierarchy' vs 'community'. Joly and Dandoy (2017) find that party ideologies shape their foreign policy priorities which has an influence when deciding the foreign policy positioning of coalition governments. This fits with the observation by Alden and Aran (2017), who note that many of the "determining points" of ideological and policy orientation are decided at the party level (80-81).

What these approaches lack is a focus on the party as an organization outside of government formation. This is an understandable approach, as it is government that implements foreign policy, but one that does not address our concerns about the range of democratic choice in policy. Interestingly, this singular focus on government mirrors how research on moderation is focused on the conventional inclusion-moderation model; parties moderate as they become assimilated into electoral competition, with research focused on the party leader. This is typically conceived as a one-type fits all institutional process despite evidence of context specific dynamism (Tepe 2019; Ruparelia 2006). We can try to complicate, and ironically clarify, both domestic-international interaction and moderation by seeing what other factors, besides sheer electoralism, influence or shape moderation in the context of foreign policy.

Here we can return to the cartel party thesis, which implicitly attempts to explore such factors to explain party development, including moderation. The atomization and decline in party membership not only represents a 'delinking' of party and civil society,

but it also creates challenges for the party. The loss in party revenue from decreased membership and donations is compounded by the increasing costs to run a party, let alone an election. This is due to the modern need for a professionalized party of expensive pollsters and consultants (Katz and Mair 2018, 114-115; Van Biezen 2003, 35). As van Biezen and Popecky (2004) note, "the public financing of political parties is our first indicator of the party-state linkage" as parties need to compensate for funding decreases (238). According to Strom's (1990) tripartite theory of vote, office, and policy seeking, public financing allows for more centralized, professional and capital-intensive campaigns, which in turn decreases the need for parties to focus on labour inputs (i.e, party activists and members). Since policy-seeking can often be used to gain the labour and support of party activists, this financing "reduces the intensity of policy-seeking party behaviour" (581). However, do these facts fit together causally in the manner suggested by the cartel party thesis?

The effects of labour incentives tie into concerns around intra party democracy (IPD) consistent with the cartel thesis. As the name suggests, intra party democracy refers to processes and organizational structures within the party that operate under democratic principles and has drawn increasing academic attention (Cross and Katz 2013; von dem Berge and Poguntke 2017a; Borz and Janda 2020; Ignazi 2020). In other words, IPD refers to measures that broaden the selectorate, the pool of members who have the right to participate in decisions. Katz and Mair (1995) noted that increasing membership inclusion can be a way for party leaders to wrest power away from party activists as atomized members are less likely to mobilize while "the position of local activists as necessary intermediaries is undercut" as a democratic front is constructed. They tie this

form of increased IPD to the centralization noted to form the conditions for the cartel party (20-21). Borz and Janda (2020) call this 'electoral authoritarianism' (5). Centralized personalization can be expression of this tendency in practice.

The trend towards centralization noted in IPD literature is contested. Koo (2020), examining Korean party members, suggests that those who view the party as open are more likely to act as 'free riders' rather than become party activists. Lehrer (2012) suggests that party leaders with inclusive selectorates are more responsive to the median party member rather than the median voter, while exclusive parties in multiparty democracies are not responsive to either their supporters or the median voter. Loxbo (2011) complicates the narrative of increasing elite control by showing that party activists in SAP influenced more control over party policies in the 1990s than in the 1950s, with party leaders experiencing the opposite fluctuations in power. Engaging with the question of IPD not only acts a proxy to test the cartel party thesis causally, but it also allows us to test the empirical and constituent elements of the thesis itself.

As we noted in the introduction, we are interested in taking a Marxist-inspired approach to our international conditions, due to its holistic and structural understanding of linking the international to the domestic. However, this begs the question of what Marxist understanding we will take. Although there is some indication that Marx eventually planned to write detailed studies of such topics as the nature of the state and the international system, he failed to do so in any systematic sense before he died (Brewer 1990). Callinicos (2010) and Harvey (2005) have attempted to modernize the monopoly capital argument of Bukharin and Lenin, arguing that there are separate economic and geopolitical logics that ensure that nation states are the key actors in a

capitalist global order. Whereas Lenin and Bukharin expected geopolitical competition would continue under capitalism, Kautsky believed that the homogenizing forces of capital would blur national distinctions and create a transnational class of capitalists under global capitalism. Callinicos points to Robinson (2010) as a revival of this idea in modern scholarship (Callinicos 2010, 14-15). Robinson's (2010) theory centres on the power of a transnational capitalist class (TCC). For him, states are becoming enmeshed in a transnational institutional structure including such organizations as the IMF and World Bank and pursue the interests of capital above even their 'national' interests (69-70). Klassen (2014) builds on Robinson's view of a transnational class to suggest that the internationalization of capital forms an 'Empire of Capital' which creates mutual drives for interstate cooperation and rivalry. Adopting this perspective, which takes a holistic view of 'the international', allows us to see if it, and by extension a non-realist structural view of the international, has utility in understanding the dynamics of moderation in a more straightforward and coherent way.

Our research grasps many different strands of scholarly literature and attempts to weave them together in the hopes of illuminating and shifting. Moderation holds deep normative value for us and is an undertheorized process in literature. However, by centering this concept, largely assumed to be solely electoral, we can contextualize and draw out our key theoretical interest in the party-foreign policy literature cited above - how do the two 'spheres' of politics, domestic and international, interact and influence each other? Do institutional/ structural factors play a role that can be separated from pure electoralism? These questions can be answered while testing the utility and validity of both the TCC and cartel party theses.

2.2 – Research Design

Qualitative Comparative Analysis (QCA) is a method of political analysis originally developed by the American sociologist Charles C. Ragin (2014). As noted in the introduction, this is the methodology we will adopt at this stage to examine our research questions. QCA is described as an 'intermediate-N' form of research, inhabiting a middle ground between large-N quantitative and small-N qualitative case studies (Halperin and Heath 2020, 248). If QCA is a numerical middle ground, it is also designed as a methodological middle ground, combining elements of quantitative and qualitative approaches. This is because it aims to combine the precision of quantitative measures with the detailed calibration that comes from case-focused qualitative studies (Ragin 2008, 82). QCA was designed on the principles of set theory, studying well-defined groups sharing common traits. Sets can be nested within each other. For example, dogs are a subset of mammals (Ibid, 13-15). Ragin (2014) originally developed QCA using a 'crisp set' method (csQCA), which used a binary measurement of set membership. Later he expanded this method to create fuzzy set QCA (fsQCA) (Ibid, xxii). The distinction between them is that fuzzy sets are not binary and use interval or ratio values between 0 and 1 to indicate the degree of membership in a set, allowing for qualitative assessment expressed quantitatively (Ragin 2008, 30). The ability to examine the interaction of well-defined sets in QCA is particularly useful for "unravelling causal complexity in order to detect the different conditions (or configurations) that can lead to the same outcome occurring" (Heath and Halperin 2020, 248).

Therefore, set membership is very important when creating "variables" in QCA. Calibration is the method translating data into a numerical score from 0 to 1 (for example

0.4, 0.6), "adjusting them so that they match or conform to dependently known standards" (Ragin 2014, 72). There are two general methods, direct and indirect. The direct method is more complex and mathematical, involving taking the log of odds of the numerical values and converting them (86-94). The indirect method is comparatively simpler, lacking any mathematical function (Dusa 2019, 92). Here membership is assigned according to detailed and specialized knowledge of the cases (Ragin 2008, 94-97). Our calibrations will be elaborated on in chapters three and five, but where possible we rely on the direct method.

Once cases and variables are justified and chosen, which will be discussed in more detail below, the QCA will proceed in several steps. First, it is important to test consistency and coverage. Consistency tests the degree that certain combinations in producing the outcome in question, or the necessity of the hypothesized variable, while coverage determines the relevance of the measure in producing the outcome, in other words, the sufficiency of the variable (Ibid, 44-45). Then, it is necessary to create a truth table which will reveal significant causal configurations using Boolean algebra (125). These methodological steps will be calculated and completed in RStudio using the R programming language. There is a specific downloadable package in R that can run calculations for all QCA steps, as well as a handbook by Dusa (2019) which explains the R coding language to run these calculations.

Before moving, it is necessary to explain the meaning of "configuration" in QCA. Although we have and sometimes do use the term "variable" for the sake of simplicity, Ragin (2008) prefers the term "configurations of conditions" (6). This is because he sees variables as reflect a more general and contextless quantitative style and mindset (Ragin

2014, 54-55). Unlike most statistical variables, which are analyzed according to their probability, sets are measured according to their truth value, how much they belong to their assigned set (Ragin 2008, 88). Therefore, the goal of QCA is to design studies in different set configurations to reveal necessary and sufficient conditions for the "dependent variable" outcome. These configurations are revealed through the process of creating truth tables using the fuzzy set scores, which show which conditions are associated with the output of our main condition, namely the 'dependent variable' moderation. The successful configurations created through these truth tables can be minimized into short equation-statements to denote which combination of conditions in our cases create the moderation that we are examining (Dusa 2019, 159).

It is this element of QCA which, while respecting its limitations, makes it a logically useful method to begin our study. While we are hypothesis-testing, there is also an implicit element of hypothesis making in this preliminary part of the study. By discovering patterns in a complex of conditions, we can begin to further refine a mechanism-focused hypothesis. Unfortunately, this exploratory element also limits what we can do at this stage of research. By identifying conditions, we are not necessarily identifying mechanisms. Identifying a necessary condition may suggest one, but we have no insight as to how conditions active the process of moderation. While this can be remedied with case studies, that does not mean our method leaves us without any insight to processes whatsoever. We are also testing theoretical hypothesises. If our hunch about domestic and international structures is correct, we should see a consistent configuration

that involves both sets of conditions. If we expect the cartel thesis to be accurate[1], we should see a consistent presence of high public funding and low party activist engagement in our configurations. If we expect Robinson's TCC thesis to have explanatory power, we should see the consistent presence of transnationalization. Can we approach a question like this with a paradigmatic view, or do we need a more flexible, pluralistic and contextual approach? Our research itself does not explicitly identify mechanisms, but our results will shed light on the utility and/or validity of certain theoretical perspectives which have their own implied mechanisms. If our results do not return consistent configurations in line with theoretical expectations, then it suggests that applying such a theoretical perspective is either off base or its elements need to be reworked into an alternative theory.

A final issue to note is temporality. In its most basic form, by examining membership in different causal configurations, QCA examines cases within a "snapshot" of time with no consideration of their chronological ordering (Pagliarin and Gerrits 2020, 2). While this by itself may be sufficient for some forms of research, it poses problems for the research question and design we have proposed. As will be elaborated in the next chapter, the focus of our research, moderation, is an inherently temporal phenomenon – it reveals itself in change over time. QCA specialists have discussed several different proposals to incorporate temporality into their research projects. Verweij and Vis (2021) note three different strategies that researchers can pursue: using multiple time periods within a single QCA, running multiple QCAs for each time period, or implementing a

[1] This operates under the assumption that foreign policy is similar to any other kind of policy (which some research does indicate) and that the moderating, de-ideologizing impulse of becoming an 'efficient manager' party proposed by the cartel party thesis would be apparent across the ideological space.

strategy known as 'fuzzy set ideal type analysis'.[2] While this is a promising strategy, we are unable to use it, as we are looking at five instead of two conditions. Instead, we have decided to run multiple QCAs for our different time periods. While this method is noted to be occasionally difficult to interpret, it allows us to examine different solution terms over time to see which conditions constant, and which conditions change over time (Ibid, 103). While we will necessarily have to 'smudge' details to represent them in a bloc of time, dividing our QCA into two separate time periods does give us some indication of trends. 'Unsmudging' the details to add more descriptive and explanatory depth to our cases is why future steps in our research project will require case studies.

As a method driven by set theory, QCA requires a set of cases to examine. We have chosen fifteen parties from eight different countries for our analysis. Three of these represent a single party within a single country, specifically the UK Labour Party, the Canadian NDP, and the Japanese Communist Party. The remaining cases represent pairs of parties per country: Die Linke and the Social Democratic Party in Germany, the Labour Party and Sinn Fein in Ireland, in Norway, in Sweden, in Portugal, in Spain. The number of cases selected is affected by the number of variables within our study. Fiss (2009) notes that the most basic QCA analysis, with four conditions, requires at least ten to twelve cases. Since we have five conditions that we are examining in this study, this has determined our minimum number of cases of at least thirteen to fifteen. We have chosen the upper range of fifteen.

[2] Fuzzy set ideal type analysis is a strategy in which four quadrants representing all possible combinations of the presence or absence of two conditions are created as ideal types. Cases are then coded to these conditions and assigned to an ideal type if the membership score is greater than 0.5 (Ibid, 105).

The geographical spread of cases has also been deliberate. Since our research question is informed by common Marxist and critical-theory scholarship surrounding global hierarchies and development, we have selected our cases to be from countries widely considered the 'Global North'. Furthermore, we have deliberately left out the United States as one of our cases, since the relationship of our case countries to America is an important element of our configurations. This also has the benefit of ensuring that all our cases, despite their differing electoral systems, are parliamentary democracies, to control for the differing institutional and competitive logics of presidential and parliamentary systems.

Finally, the choice of two cases per country is important. Methodologically, it is important to recognize that we are treading on dangerous ground by examining both domestic and international factors, effectively two levels of analysis. If every single case came from a single country, it would be difficult to distinguish if the international, effectively national level effects, came from our choice of country or choice of party. Our cases would effectively double as both country and party, necessitating most case country have two case parties. The single-party cases, while their countries lack multiple left-wing parties, are a necessary inclusion. The United Kingdom is America's predecessor as a global superpower, and a key ally of America. Meanwhile, without Japan and Canada, this would be a study of European countries and parties in relation to the United States, rather than truly reflecting the concept of a 'Global North' and seeing how such a concept works cohesively and in relation to the United States.

CHAPTER 3 – Constructing our Conditions

QCA analysis depends on analyzing case sets according to membership in certain conditions. In this chapter, we will explore the conditions we are hoping to test. These include both our outcome condition, moderation, like the dependent variable in conventional statistical methodologies, and our testing conditions, similar to our independent variables. As it is the object of our research, we will spend the most time examining moderation. We will look at the Comparative Manifesto Project which we have used as a tool to collect data, the nature of the left-right spectrum and how it impacts our conceptualization of moderation, followed by its operationalization. We will then do the same for our other conditions; party strength, public funding, intra party democracy, transnationalization, and security integration.

3.1 – The Comparative Manifesto Project

The Comparative Manifesto Project was first developed by Ian Budge in 1979 as the Manifesto Research Group. It became the CMP in 1989 when the project became hosted by the Social Science Research Center Berlin (Volkens, Bara and Budge 2009, 237). The project is the first cross-national database that allows for scholars to compare the "ideational content" of party manifestos over time and in a structured manner, dividing positions into left and right (Cochrane 2015, 55). The Project includes data from 54 countries (Budge and Meyer 2013a, 13). As a result, data from the CMP has been used by many scholars to undertake research comparing parties both ideologically and programmatically (Koß 2010; Cochrane 2015; McGrane 2019).

The data generated by the CMP can be found in the Manifesto Project Database (MPD) (Budge and Meyer 2013a, 13). Using this database, researchers can find 'scores'

for parties based on 57 constructed policy categories that are divided into left-wing and right-wing positions. Party manifestos are then analyzed for 'quasi-sentences' that fall under these policy categories and then coded as such. (Budge and Meyer 2013b, 86). Once 'quasi-sentences' associated with policy positions in manifestos are coded, it is possible to use each code's designation as either left or right to construct a composite score that allows a user of the MPD to place a party on a left-right continuum. The MPD measures left and right on a scale, with 0 designating the centre, -100 designating only left statements and 100 designating only right statements. This is the 'left-right' or RILE scale (Manifesto Project Team 2018).

3.2 – Political Ideology: The Left-Right Spectrum

The concept of ideology lies at the heart of our research, and therefore we must unpack it before getting too far ahead in our journey. Despite the widespread use of this idiom of left and right, the precise meaning of the two axes can still be left unclear. The term originates in the opposing sides of the French Revolution, which in turn has been shifted by scholars into a focus on the questions of equality or inequality (Arian and Shamir 1983, 139). Bobbio (1996) takes equality as the defining characteristic of the left and the main guidepost for dividing the left and right (60, 71). Noël and Thérien (2006) take this idea further and argue that "enduring and profound differences about equality" remain key political issues, and that the left-right conflict is one of the main methods of structuring these disagreements (3).

If the left-right spectrum centers on attitudes towards change and equality, then we are left to ask what a 'left-wing' position means in practice when it addresses matters outside of formal social or economic equality. There seems to be no inherent connection

to positions on internationalism and peace if we define left and right on these criteria. Jahn (2010) argues placing topics such as peace and internationalism on the left is the result of an inductive approach to defining left and right, based on deriving the meaning of 'left' from the practices and self-identification of parties. From this perspective, pro-EU integration could be called left due to its support among many left-wing parties (Ibid, 750). Instead, Jahn argues that a deductive approach based on "political theory and philosophy", relying primarily on equality, is preferable to this inductive approach (Ibid, 751-752). Interestingly, Jahn suggests that the philosophy behind the CMP's RILE categories are based on induction (747). However, Budge and Meyer (2013b) themselves take issue with Jahn's categorization and argue that, while based on inductive categories, RILE is deductive in that it is constructed prior to any empirical application (88, 105).

Rather than inductive or deductive, Cochrane (2015) suggests that the left and right can be conceptualized in terms of 'family resemblance'. 'Left' and 'right' positions exist in a network of related ideas, drawn together both through practical action and historical legacies drawing these ideas together, but also by a shared method of contextualizing these concepts together. Leftists and rightists share certain "considerations" that shape how actors think about policies. Since these considerations are different for each side of the spectrum, the dimensions of left-right thought are not symmetrical and cannot be generalized (6-7). As an illustration of this point, Cochrane looked at "the correlation … between the positions of political parties…… and the scores that those parties received on each category of the CMP" (Ibid, 70). From this he was able to note that while not all left-wing positions correlate with each other, left ideas

consistently are positively correlated with other left-wing positions and negatively correlated with right wing positions, and vice-versa (Ibid, 74)

Cochrane's family resemblance theory emphasizes the fact that one can only examine left and right positions in relation to each other. Left and right are meaningful only as relational concepts and have no externally valid criteria (Ibid, 19-20). While an admittedly inductive approach (Ibid, 14), family resemblance also relies on the political spectrum as it is created by actors in a deductive manner, like Budge and Meyer's (2013b) arguments cited above. If that is the case, family resemblance can be mapped onto both sides of Jahn's division of deductive and inductive methodologies.

If the family resemblance model can be said to incorporate both methodologies of defining left and right, then we can more theoretically justify both our use of the CMP, and our measure of foreign policy. A deductive definition of the left as subscribing to traditionally socialist values like internationalism, anti-imperialism and peace is perfectly justifiable. While technically deductive and generalized, it is also the position that one would come to *inductively* by looking at the history and historical positions of left-wing movements. Budge and Meyer (2013b) use the grouping of peace and welfare among early 20th century Marxists and/or progressives to argue for placing both positions on the left (89). All our party cases have their origins in left-wing labour politics. Thus, while generalized, we are empirically and theoretically justified in describing foreign policy and defense positions as 'left-wing'.

Can foreign/defense policy be unidimensional? Bjereld and Ekengren's (1999) surveyed American and Swedish foreign policy attitudes, revealing the Swedish public's attitudes can be arranged on two dimensions, proposed by previous researchers, the first

being a non-militarism to militarism dimension (dealing with non-alignment as well as UN, NATO and EU defense cooperation), and the second being a multilateralism – unilateralism dimension (Ibid, 156). The CMP policy positions measure both attitudes to militarism and multilateralism (framed as internationalism) as left perspectives along a single axis, rather than as aspects of separate dimensions. If we adopt the idea of 'family resemblance', we can justify adopting a unidimensional line, as a grid would prevent both being defined as left.

3.3 – Policy Moderation

Now that we understand the left and right and have a scholarly tool which can create spatial distance between parties on issues, we can understand our definition of moderation as a converging decrease in the range of positions. Cox (1990) uses the terms centripetal and centrifugal to denote this process of converging on the centre or being pulled to the extremes of a spectrum. In this sense, moderation is the opposite of party system extremism (Dow 2011; Abou-Chadi and 2016). However, this general insight can be refined through an important scholarly caveat. Cox (1990) makes clear that since moderation is defined in terms of electoral competition, moderation must be context specific.

Moderation necessarily involves comparison and change-over-time. As we noted in section 3.2 regarding the relative relationality of the left-right spectrum, moderation itself must be relational. Rather than meeting in the Platonic ideal of a political middle ground, moderation must mean that parties are moving in the direction of general agreement with each other. Naturally, movement is a necessary condition for this convergence; parties need to shift from one position either towards or away from another

position if we are to characterize them moderating or polarizing. This means we need to examine the change between different points in time to see whether parties are converging together. Combined with our adoption of a relative or contextualized concept of the political spectrum, we can clarify that moderation refers to the reverse of polarization. If polarization refers to an increas(ing) gap between parties' political positions, then moderation must mean a closing of a 'gap' between positions. As a counterpoint to our left-wing parties, the main right-wing party in each country to act the anchor by which we can measure either an increase or decrease.[3]

3.4 – Measuring Moderation with the Comparative Manifesto Project

Our discussions of moderation and the Manifesto Project now allow us to describe the methods we will use to calculate and operationalize our main condition. Moderation shall be operationalized in our study as a decreasing 'distance' between left-wing parties and their closest right-wing competitors. The CMP and its analysis of party position and messaging using manifestos gives us data that we can use to calculate this numerical 'distance' in a comprehensible and calculatable manner. By following the changes in this distance overtime, we can see trends that reflect either moderation or polarization. We can then calculate the trend percentage for each case that will reflect its degree of moderation or lack thereof. Since our QCA will be split into two periods, we will calculate two different trend percentages. To ensure that we do not miss any years,

[3] Some methods have been created to calculate the polarization of a party system holistically (Dalton 2008). One could naturally ask why not use this method in our study. There are two reasons. The first reason is that doing so would mean we are comparing an individual party to a collective party system, which includes the party we are aiming to measure as well. Furthermore, if the rise of radical right-wing parties like UKIP or Alternative for Germany were to cause the overall party system to become more polarized, it would be irrelevant to whether left-wing parties are becoming comparatively more moderate or polarized in relation to the main, centre-right political option.

Table 3.1 – Manifesto Database International Relations Variables

Variable Number	**Title of Variable**	**Description of Variable** **(Manifesto Database Codebook 2020, 10-12)**
101	Foreign Special Relationships: Positive	*"Favourable mentions of particular countries with which the manifesto country has a special relationship; the need for co-operation with and/or aid to such countries"*
102	Foreign Special Relationships: Negative	*"Negative mentions of particular countries with which the manifesto country has a special relationship"*
103	Anti-Imperialism	*"Negative references to imperial behaviour and/or negative references to one state exerting strong influence (political, military or commercial) over other states."*
104	Military: Positive	*"The importance of external security and defence." (i.e., support for increased expenditure, national defense, military modernization)*
105	Military: Negative	*"Negative references to the military or use of military power to solve conflicts. References to the 'evils of war'."*
106	Peace	*"Any declaration of belief in peace and peaceful means of solving crises – absent reference to the military"*
107	Internationalism: Positive	*"Need for international co-operation, including co-operation with specific countries other than those coded in 101" (i.e., support for aid, global governance, the UN, etc.)*
108	European Community/Union: Positive	*"Favourable mentions of European Community/Union in general"*
109	Internationalism: Negative	*"Negative references to international co-operation. Favourable mentions of national independence and sovereignty with regard to the manifesto country's foreign policy, isolation and/or unilateralism as opposed to internationalism."*
110	European Community/Union: Negative	*"Negative references to the European Community/Union"*

we will be including some years in both calculations. For example, we have four Swedish elections in our timeframe: 2002, 2006, 2010, and 2014. If we calculated the trend percentage for 2002-2006 and 2010-2014, we would not be counting the time between 2006 and 2010. Therefore, our calculations will be for 2002-2010 and for 2006-2014. As Budge and Meyer (2013a) note, one of the strengths of the MPD is its openness. Although there are pre-set measures, scholars can use the base position variables to create their own measurements, or even expand those original variables on further research (13). In our case, the already existing variables suffice for our purposes. Since we are concerned with 'foreign policy' and international issues, we shall create our measure using the existing coding for foreign policy. There are ten variables listed under that category, which are reproduced in table 3.1.

When constructing both our left-wing and right-wing scores, we are using the variables that the CMP itself classifies as left and right respectively. A negative view of the military, peace, positive internationalism, and anti-internationalism are categorized as left (Manifesto Project Team 2018). Cochrane's (2015) network analysis also allowed him to rank the CMP variables according to their centrality or peripherality on each side of the spectrum. Out of 24 total left variables, the ones listed above were ranked as second, eighth, fourteenth, and sixteenth (71). For the right, only a positive view of the military is categorized as right by the CMP (Manifesto Project Team 2018). Cochrane's (2015) analysis shows that of 16 right positions, a positive view of the military was the third most central position, while negative internationalism was in a neutral category (71). We have categorized negative internationalism as a right-wing coded belief because it is the opposite position to an explicitly left-wing view – positive internationalism, it

effectively represents a position on a multilateralism scale, which was discussed in section 2.5 as a part of the left-right spectrum, and it allows right-wing scores to be coded on more than one variable. However, it should be noted that because of the larger variables on the left position – most foreign policy scores tend to lean left. This is another reason why it is important to measure foreign policy moderation in relation to another party, rather than by the absolute numbers suggested by RILE.

In constructing our scores, we have left out both variables 101 and 102 – dealing with special relationships, as well as 108 and 110 – dealing with the European Union. Variables 101 and 102 have no intrinsic connection the political left and right and are heavily context dependent. Our decision to leave out the European Union variables is more questionable and was influenced by several factors. First, the EU is a relatively recent institution, that does not have a parallel in the historical origins of labour movement internationalism. While this is true, a critic may suggest that the EU closely relates to the concept of multilateralism which is an acceptable evolution of these principles to include in our scores. However, EU integration is a contested process (Hooghe and Marks 2019) EU integration could be a vehicle for multilateralism, which one could oppose or critique without rejecting the concept of multilateralism altogether. In the 1990s, Sinn Fein opposed EU membership due to its potential threat to active Irish neutrality (Devine 2009, 481-482). When Ireland did join the EU, Sinn Fein's position remained opposed to European defense cooperation arguing that such measures should be the responsibility of the UN (Ibid, 485). The party has made a troubled rapprochement with the EU in recent years (Maillot 2009), showing one can be supportive of multilateralism outside of the EU and 'supportive' of the EU while disagreeing on the

nature of its defense policies. This demonstrates the third factor; European politics can be categorized along two dimensions, left and right and pro and anti-EU (Angelucci and Isernia 2020, 67). If there is no inherent connection with the EU and the left-right spectrum, incorporating it into our scores will only further complicate our justifications for proposing a unidimensional left-right spectrum in the first place.

We will analyze our foreign policy scores by the same principle that RILE scores are calculated. The primer on working with data suggests three different methods of calculating RILE scores, the second and third of which solve are less problematic than the original. We will call them the 'log' and 'position' methods after their calculation method. The 'position' method involves *subtracting the right score from the left score, and then dividing by the right score added to the left score*. The log method involves taking *the log of the right score divided by the left score*. The main theoretical difference between the two methods is that the 'position' method calculates the party positions "independent of the emphasis of left and right issues. If parties speak very little about left issues, but even less about right issues, they will have a leftist position", while the 'log' method makes the repetition of statements less impactful on their final score (Manifesto Project Team 2018). While the CMP suggests that all methods are generally equivalent, our preliminary research shows that this is not always the case (Ibid). We have decided to use the position method.

3.5 – Party Strength

Electoral democracy is a competition for governance. To achieve electoral success, it is necessary to court voters. In many ways, this competition would seem to be the simple yet banal explanation for any policy moderation. However, we are interested

in what (or if) other domestic and/or international conditions influence foreign policy. Therefore, including some condition that can represent this factor is important methodologically. Despite its importance for our research design, there is no consensus on any one model of electoral competitiveness (Kaysar and Lindstädt 2015; Abou-Chadi and Orlowski 2016). There have been attempts to construct a working model of electoral competitiveness, but one flaw with most of these models is that they do not operate at the party level, but rather the party system level (Abou-Chadi and Orlowski 2016, 871). If our unit of analysis is the single political party, it is important to have our domestic level variables be as party specific as possible Some attempts have been made to develop party specific models. Among those that do, either the focus is too strongly on governing parties (Kaysar and Lindstädt 2015), or they depend on their own models of moderation at odds with ours (Abou-Chadi and Orlowski 2016).

Instead, we will instead focus on the idea of party strength, using elements of the models developed by Paolo Chiocchetti. This model is a holistic combination of four different components – electoral strength, parliamentary strength, government strength and membership strength (Chiocchetti 2017, 20). All these components can be considered in *absolute* terms, *systemic* terms, or *societal* terms[4] (Chiocchetti 2016, 8). We will use systematic calculations of electoral strength, parliamentary strength, and government strength to measure party dynamics within a party system utilizing the votes parties receive as a percentage of all valid votes, parliamentary seats in relation to the parliamentary total, and "relevant seats" in relation to all relevant seats respectively

[4] Absolute terms detail the resources the party controls without reference to any other parties. Systemic terms describe relative strength within the party system. Societal terms compare the party in comparison to total society (Chiocchetti 2016, 8)

(Ibid). The definition of the term "relevant seats" is important to understand as it helps illuminate our reasoning for choosing this model. For Chiocchetti, relevant seats "are defined as the seats of parties belonging to the government-supporting coalition only (either actually represented in the cabinet or supporting it externally)" (Ibid, 6). In other words, as we are examining parliamentary democracies, relevant seats are the seats needed to form a majority government. A government with over fifty percent of the seats in parliament would control one hundred percent of the relevant seats, as they can rely solely on themselves to govern. A minority governing party's relevant seat percentage would be determined by seeing what percentage of the seats needed for a majority that it occupies.[5]

There are other benefits to using this measure. The ability to calculate a party's success in parliament, elections and government allows us to show the party's position and trends regardless of their specific electoral framework. By counting the three components systemically, we can account for institutional differences, and more clearly distinguish smaller parties which take part in government coalitions and those who do not and do so in a meaningfully abstracted and generalized way, which is necessary for our QCA analysis. Furthermore, by using systemic measurements we can also incorporate parties within their relative party system, a key theoretical consideration. We have decided on a 30%-30%-40% weighted split for electoral, parliamentary, and government strength respectively to demonstrate these differences.

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[5] While this method can easily accommodate most of our cases, it is unclear as to how it could handle conditional support within a minority parliament. There are a few cases in which this is the case: namely, the IU in 2008 and the NDP in 2004. This does leave us with the question of what about to do about these cases. While not an official coalition, we have decided to count a party's seats as relevant in the same way we would a junior coalition partner.

3.6 – Intra Party Democracy

Parties differ not only regarding their place within party systems and effectiveness within electoral systems, but also according to their internal organizational structures. The recognition that political parties are multi-faceted organizations shifts focus to the forces within parties, and the division of power and institutional strength within them. An effect of this shift has been increasing attention to the concept of intraparty democracy (IPD) (Cross and Katz 2013; von dem Berge and Poguntke 2017a; Borz and Janda 2020; Ignazi 2020). As the name suggests, intraparty democracy refers to processes and organizational structures within the party that operate under democratic principles. The definition of democracy itself however is contested (Cross and Katz 2013, 2). In a famous article examining the concept, Rahat, Gideon, and Katz (2008) show that three values often considered democratic within parties; inclusivity, competitiveness and representativeness, can be negatively correlated and subsequently not simultaneously maximizable.

Therefore, for IPD to be measurable and operationalizable, we must first choose a value to guide our measurement of IPD. For the purposes of this report, the guiding value of IPD will be inclusion. IPD is therefore defined as measures within a party that encourage the broadest inclusion of members into decision-making. In other words, IPD refers to measures that broaden the *selectorate*, the pool of members who have the right to participate in decisions. Concerns around selectorates, and their levels of inclusivity, guide many party-specific discussions of IPD; as Hazan and Rahat (1010) note, a party's selectorate forms the 'demand' side of the equation, with candidates providing the supply. The nature of the demand is important in effecting what supply is chosen (33-24).

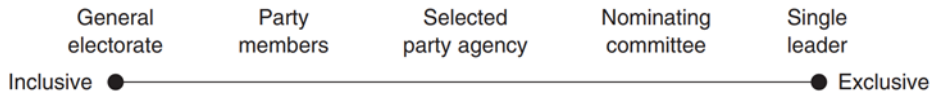
Von dem Berge and Poguntke (2017a) have constructed indices grounded in inclusion to measure a party's IPD that we can use as a base to operationalize IPD (139). These indices are created from a combination of party's organizational structure, how the party makes decisions about personnel, and how the party makes decisions about its policies and programs (Ibid, 142). As the indices are numerical, it is quite easy to code into fuzzy set scores and can assist in capturing a wealth of case-based information. In fact, von dem Berge and Poguntke even use the logic of fuzzy sets when devising their scoring system for differing levels of inclusivity, using numerical scores between 0 and 1 to indicate the degree of inclusivity for various elements of candidate and leadership selection (Ibid, 147).

Readers may have noticed our consistent use of the plural form of index. This is because von dem Berge and Poguntke (2017a) have several different indices to capture the different *varieties* of IPD. The main distinction they make is between *assembly*-based intra party democracy (AIPD) and *plebiscitary-based* intra party democracy (PIPD) (138). Assembly-based IPD refers to decision-making centered on groupings of party members that can deliberate on options and propose changes. Plebiscitary-based IPD, by contrast, describes a situation in which voters can accept or reject candidates or suggestions, with no room for collaborative deliberation (Ibid). These different indices measure the inclusivity of candidate and leadership selection, which will form the basis of our model, by assigning a numerical score to the methods of selection. For PIPD scores, if membership can vote, then the party would score a '1'. If not, the party would score a '0'. For AIPD scores, potential scores range from 0.75 to 0.50 to 0.25, depending

on whether the local, regional, or national party bodies have final say in the selection (von dem Berge and Poguntke 2017b, 5,8).

If we want to construct a single fuzzy set score using these methods, this naturally raises problems. We have some parties that fit the AIPD model and some that fit the PIPD model. Furthermore, not all our parties clearly fit into either model. Examining the data, some parties, such as PS, exhibit an element of PIPD in one respect while exhibiting an element of AIPD in another. Their model does implicitly admit there are elements of both AIPD and PIPD within parties, as only using one measure ignores important facts about existing party structures.[6] It solves this by suggesting that the two different scores could be combined into a quadrant (Ibid, 147). However, here we have the same problem we did in our discussion of the left-right spectrum. However, there is academic precedent for showing IPD along a unidimensional line (Rahat and Hazan 2006; Lisi and Freire 2014).

Figure 3.1 - Example Unidimensional IPD Scale



Source: Rahat and Hazan 2006, 110 1

Figure 3.2 - IPD Scale 1 (IPD1)

OMOV	Local Party	Regional Party	National Party	Leader
1	0.75	0.5	0.25	0

[6] For example, the PIPD model includes no elements of the organization structure of a party, even though such structure has clear implications for the relative power of party elites vis-à-vis either members or lower-ranking members of the party elite. Instead, these elements are included in the AIPD score due to its non-dichotomous nature.

Figure 3.3 - IPD Scale 2 (IPD2)

Local Party	Regional Party	National Party	OMOV	Leader
1	0.75	0.5	0.25	0

An issue with adopting a unilateral scale that combines both indices is that von dem Berge and Poguntke argue that AIPD and PIPD represent two different logics; AIPD representing actual debate, and PIPD represents the party accepting or rejecting a decision and is suspected to be a function of the increasing power of leaders/central party officers (Ibid, 144). These concerns over "electoral authoritarianism" is the reason why Borz and Janda (2020) suggest inclusion may not be the best measure for IPD (5). Both pairs tie this insight to Katz and Mair (1995) who noted that increasing membership inclusion can be a way for party leaders to wrest power away from party activists as atomized members are less likely to mobilize while "the position of local activists as necessary intermediaries is undercut" as a democratic front is constructed (20-21) We could accept the premise that plebiscitary models of party democracy effectively act to empower leaders and that, by implication, inclusive assembly-based voting helps to challenge leaders. If we do, we can paradoxically treat the existence of plebiscitary voting as a less inclusive form of IPD and score it with a lower score according to their already existing index. Alternatively, we could accept their counterpoint and argue that, for our purposes, there is no functional distinction between their logics – plebiscitary voting is as inclusive as it appears in the Rahat and Hazan diagram. Since we are unsure of which choice is the correct choice to make, and our decision is theoretically important, we shall construct two separate dimensions, seen above, incorporating the different arenas of voting as the appear in von dem Berge and Poguntke's indices. We shall run

each our QCA twice with our own separate logics, to see if there is any notable pattern that emerges from our study.

3.7 – Public Funding to Political Parties

The cartel party thesis suggests a connection between party moderation and the increasing importance of state funding. As this appears to be an important yet contested causal mechanism for understanding moderation, it shall be the last 'domestic' factor we shall study. An immediate hurdle is the lack of available data on party funding. Lipcean (2021) notes that there is a "deficit of accurate cross-national longitudinal data" on public funding for parties (1). One of the five cited by Lipcean as providing "variable-oriented" and "longitudinal" information is the PPDB (Ibid, 3). However, the dataset is rather limited, particularly in ways that foreshadowed issues with our attempts to buttress our data from other sources. Current data within the database only covers the years from 2011 until 2014. Furthermore, not all parties have data recorded, and those that do often have only a single year recorded.

Instead, we have used several methods to collect our data. Where possible we have calculated the amount of state party funding directly from publicly available party records. However, the availability of the data varies greatly from nation to nation. German documentation was the most thorough, with detailed breakdowns of funding sources by percentages (Deutscher Bundestag 2011; Deutscher Bundestag 2021). Statistics Norway already had data on hand that went back to the year 2005 (Statistics Norway 2023). This was much more difficult in other countries. Swedish regulations around political party financial reporting are extremely opaque compared to other nations (Koß 2011, 86). The *Kammarkollegiet* (Legal, Financial and Administrative Services

Agency), only has individual level party data on hand since 2014 (Kammarkollegiet 2023).

These difficulties are replicated in several other countries, which shall be discussed in their relevant case descriptions below. Our second method is designed to address these situations by finding specific citations within academic sources. For example, in their discussion on the 2007 reforms of Spanish public party financing, Viñuela and de Aguilar (2011) note that prior to this reform, public funding accounted for roughly 75% for the PSOE and 60% for the IU (6). In the Spanish case, these can be contrasted with the available records. In some cases, for example, Sweden, with its noteworthy lack of transparency, using extremely limited sources to extrapolate for the rest of the time period is almost a necessity for gathering information for our first QCA analysis. In the Swedish case, we were able to rely on information given in a report to the Swedish parliament by Gidlund and Ström (2004), which noted the percentage of party budgets supplied by public funding for the years 2001 and 2002 (44).

This is not an ideal solution, but it is a workable solution. From a methodological standpoint, we do not need to provide complete data that is comparable with time series. Indeed, with our two step QCA process, there is inherently some temporal merging in our data points. The key factor for the validity of our numbers is instead to provide representative case-sensitive data that can be used to form valid fuzzy set scores for each of our QCA calculations. This allows us to accurate compare the general tendencies of the two periods in a manner consistent with the set-theory logic of QCA.

3.8 – Transnationalization

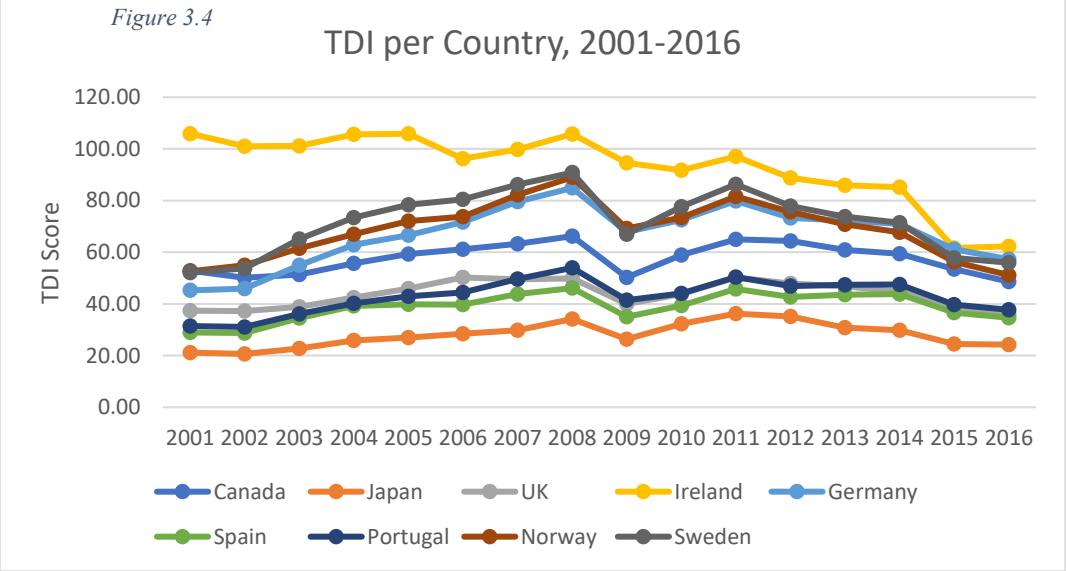
As we have discussed in chapter one, there is a broad and contentious debate among Marxist scholars surrounding the intersection of international political economy and international relations/foreign policy, particularly around the issue of a 'transnational capitalist class' (TCC) rather than national capitalist classes. One difficulty is to clarify exactly what 'transnationalization' is in the context of a QCA study. The development of a TCC is uneven, regionally specific, and exists alongside a national capitalist class (Carroll 2010; Heemskerk 2011). We are looking at both a process and a tendency, which are well-captured by fuzzy sets, in which we are seeking to capture and measure the degree to which a case exhibits a condition. As Rubinson et al (2019) note, fuzzy sets should be described with an adjective, so we can distinguish between whether a case exhibits more or less of the condition we are measuring. Transnationalization is thus a tendency that is more or less present in a country's economy. The second difficulty is the nature of transnationalization in the context of this study. Robinson (2010) contrasts the TCC theory with Marxist analyses of capitalist power that emphasis either the state system or the global dominance of the American state (63, 70-71).

We will construct our measure of transnationality by using two indicators. The first is by examining the Transnationality Index (TNI) calculated by the United Nations Conference on Trade and Development (UNCTAD). Each year, UNCTAD publishes the World Investment Report (WIR), which includes, in its annexes, a list of "The world's top 100 non-financial TNCs, ranked by foreign assets". Included in this report is the TNI for each of these 100 TNCs. The TNI is calculated by comparing the foreign to total ratios of assets, sales, and employment and is meant to show how much a corporation's

activities are based within their national market or the international market (Carroll 2010, 147). Carroll (2010) notes that the TNI is a "serviceable indication" of how much of a company's assets, employment, and sales are "located outside of its national domicile" (147-148). However, the TNI faces limitations on available data and sample size.[7]

We must supplement our TNI scores with alternative data to fill in the gaps. We shall use TDI scores as that supplement. TDI refers to the 'trade dependence index' developed to show trade's relative importance to a national economy and "can give an indication of the degree to which an economy is open to trade" (Mikic and Gilbert 2007, 18). While Mikic and Gilbert (2007) note that there are some limitations to this measure, these limitations show how useful this measure can be as a proxy for us. They note that while the index could show an openness to trade, "an open and liberalized economy" could have a low TDI score if its economy depends significantly enough on non-traded

Figure 3.4



[7] The info in the WIR is only recorded until 2008. After these, the relevant annexes are only available online, but evidently only for the year. We partially resolved this issue by finding third-party copies available on the internet. However, we were unable to find the reports for either 2009 or 2014. The sample size is limited to 100 TNCs, as a result, some of our country cases have extremely limited data. One of our cases, Portugal, does not appear once among the top 100 TNCs, giving us no TNI data for the country. Yet the country must be connected to the global economy in some way.

national markets (Ibid). In this matter, the TDI helps replicate the logic behind the TNI, in which a high score on the index is representative of an economy defined by transnational connections and commerce. The index itself is constructed by taking the sum of total imports and exports of the target country, dividing that sum by the total GDP of the target country and then multiplying the result by 100 to create a manageable index number (Ibid, 19). Following suggested sources from Mikic and Gilbert (2007), we found our sources on global exports and imports for each case country from an IMF database. The figures for each country's GDP came from the OECD. The results of this calculation can be seen in figure 3.2 below.

Table 3.2 – TNI & TDI Scores per Country, 2000-2016

Country	**TNI, 2000-2008**[8]	**TNI, 2009-2016**[9]	**TDI, 2000-2008**[10]	**TDI, 2009-2016**[11]
Canada	79.47 (2)	87.95 (1)	60.24 (2)	64.25 (2)
Japan	49.11 (7)	56.13 (7)	35.17 (8)	39.89 (8)
UK	69.86 (4)	78.95 (2)	52.32 (4)	57.06 (5)
Ireland	87.98 (1)	75.50 (4)	80.05 (1)	67.03 (1)
Germany	51.10 (5)	63.65 (6)	49.84 (5)	57.80 (4)
Spain	51.00 (6)	66.00 (5)	39.09 (7)	47.54 (6)
Portugal	0 (9)	0 (9)	14.44 (9)	15.55 (9)
Norway	45.58 (8)	32.02 (8)	47.16 (6)	40.05 (7)
Sweden	73.79 (3)	76.35 (3)	58.55 (3)	63.37 (3)

Our scores both resemble each other, and the data suggested by the literature. In both the TNI and TDI scores, all our case countries follow a similar pattern – all countries see an increase in both scores from the first period to the second, with the

[8] In order of highest to lowest: Ireland, Canada, Sweden, UK, Germany, Spain, Japan, Norway, Portugal.
[9] In order of highest to lowest: Canada, UK, Sweden, Ireland, Spain, Germany, Japan, Norway, Portugal.
[10] In order of highest to lowest: Ireland, Canada, Sweden, UK, Germany, Norway, Spain, Japan, Portugal.
[11] In order of highest to lowest: Ireland, Canada, Sweden, Germany, UK, Spain, Norway, Japan, Portugal.

exceptions of Ireland and Norway, which both see a decrease. If one looks at the footnotes corresponding to table 3.1, it is also clear that there is broad agreement between the relative positioning of our case countries. When looking at the averages of the years 2000-2008, all countries are in the same position except for the countries in the 6th, 7th, and 8th positions (Spain, Japan, and Norway in different combinations). The averages of the years 2009-2016 are more complex. Canada and Sweden are in the top three positions for both TNI and TDI. Spain and Germany are consistently in the middle three positions while Japan, Norway, and Portugal are consistently in the bottom three positions.[12] Our numbers reflect well on the data looking at transnational corporate interlocks. Klassen and Carroll (2011) note that the Canadian economy is highly integrated into global markets and that, in 2008, Canada was ranked fourth among countries with the highest TNI according to UNCTAD (381). By contrast, Japan ranks very low on both scales. This comports with the fact that Japan both remains and his historically, marginal in patterns of corporate interlocking, due to its geographical local, language barriers, and traditional style of corporate networking that leaves little room for interlocks (Carroll 2010, 129). Examining European numbers also shows a significant reflection between our numbers and the results of academic research.[13]

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[12] These discrepancies are the result of the positioning of both Ireland and the UK. Ireland's position can be explained by its rather severe drop in both TNI and TDI which presumably is the result of the Irish housing, finance and banking crisis spurred by the 2008 crash, which led to Ireland signing onto an EU and IMF stabilization program in 2010 (Whelan 2014). The UK's position is due to larger increase in the TNI compared to its overall TDI score.

[13] In his research on corporate interlocks among European firms, Heemskerk (2013) notes that the UK, France, and Germany are among the most interconnected (79). His research indicating that Germany has "a modest role" (Ibid, 92) among interlocked firms is reflected in our research, in which Germany has moderately high TNI and TDI scores. Heemskerk also compares the number of board interlocks by country at an aggregate level in both 2005 and 2010 (87). In both series Spain, Portugal and Ireland are noted to be on the periphery of the networks (Ibid). However, within the five-year period, the nature of their positions in the network has shifted. Ireland had connections with four countries in 2005 but only three countries in 2010, while Spain shifted from four to five connections and Portugal grew from one to two connections.

3.9 – Security Integration

As mentioned in section 3.8, contemporary debates around the transnationalization, or lack thereof, of national capitalist classes inherently raises questions about the status of the United States. These issues are even more pertinent when applied to security integration. The primacy of American power both globally, and in relation to the Global North, from 2000-2016 (as well as before and after) means that from a practical standpoint, emphasizing the integration and connections between our case countries and the American military is unavoidable. Security integration means the extent of military integration and connection to defense organizations in the Global North generally, and with America in particular. However, we will be able to interject some nuance into this consideration through our operationalization of 'security integration' discussed below.

To create a measurement of security integration, there are two factors that we believe should be incorporated. The first factor is participation in military alliances, primarily with the United States. Particularly, we must focus on how our case countries are integrated into a collective or bilateral alliances with the United States. This is an important consideration because of the nature of these collective military alliances. Among our cases, many case countries are members of the North Atlantic Treaty Organization (NATO). By contrast, Japan is governed by Japan-US Security Agreement, while Canada is also part of the North American Aerospace Defense (NORAD) along

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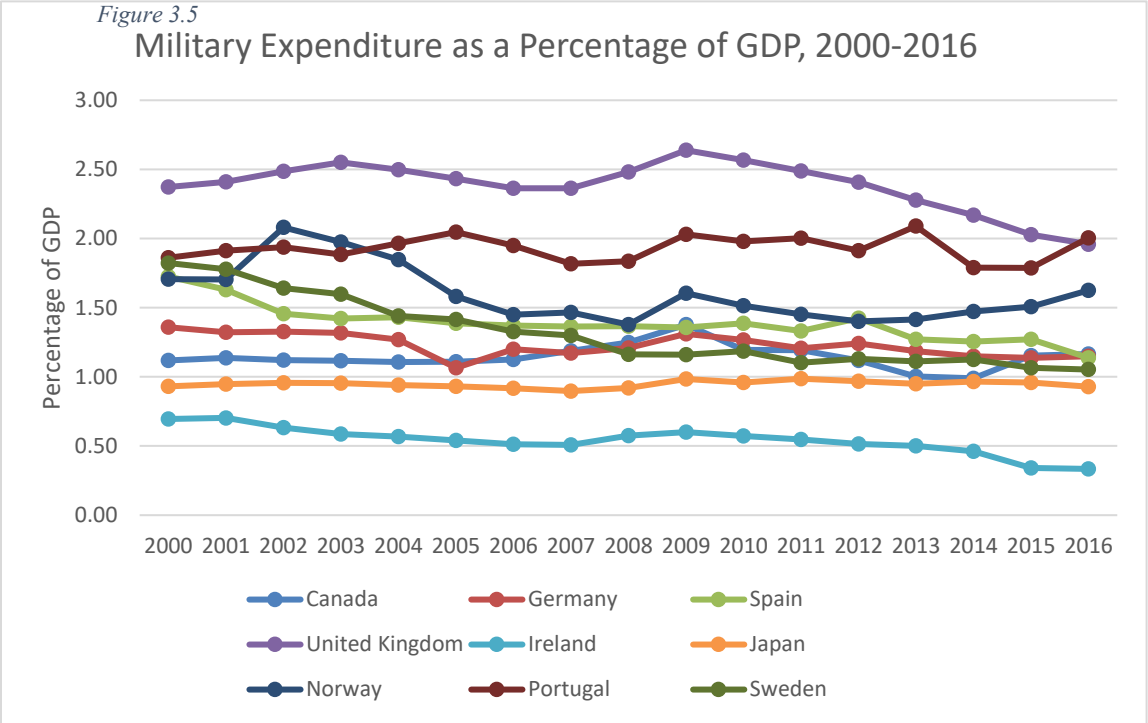
Apart from Ireland, Norway is the only other country among our cases to have shrunk, shrinking from four to two connections, which follows the pattern established by our scores, shown above (Ibid, 87-88). It also reflects the traditional marginality of southern European nations, such as Spain and Portugal, that have been increasingly integrated into the broader European TCC community (Carroll 2010, 353). All in all, our constructed scores seem to match the literature reasonably well.

with NATO. We have a collection of multilateral and bilateral defense treaties and organizations. If we accept the idea of asymmetrical independence, being a member of a multilateral organization gives a member more power to lessen the asymmetry between the most powerful member by cooperating with the other weaker members. Our examination of American military alliances must also consider participation in security partnerships as well. While countries may not be explicit members of these organizations, their military policies can be influenced by such connections. More specifically, we will be examining membership in the Partnership for Peace (PfP). The PfP is a NATO program that was launched in January 1994. PfP was designed to be a NATO-affiliated cooperation program that could provide links to NATO for non-member states, particularly former Soviet republics, without necessarily leading to full membership (Sarotte 2021, 173-181).

One final note is that we will count membership in and the nature of common European defense measures. In 1991, the Treaty of Maastricht included a pillar focus around a common European defense policy (Ratti 2018, 859). In 1999, the European Security and Defense Policy (ESDP) was created as an intergovernmental defense cooperation program, albeit one with limited capabilities (Ibid, 862). As a result, the Common Security and Defense Policy (CSDP) was formed as part of the Treaty of Lisbon in 2007 to update the ESDP to allow more effective pooling and sharing of capabilities, although still limited by a fundamentally intergovernmental framework (Ibid, 864). By including membership in the ESDP and CSDP, we can expand our definition of security integration to include the effects of multinational collective security frameworks in the European context. This is important since it allows us to connect the

security integration more thoroughly with transnationalization; it reflects the increasing importance of Europe as a multilateral and transnational entity, while allowing us to reduce focus solely on the United States as a force of 'empire'.

Figure 3.5



The second factor is what we could call 'security infrastructure' - the level of military spending as a percentage of GDP and the presence of American military bases within the country. Military spending among America's allies has been a long-running controversy, particularly with NATO. In 2014, member states of NATO agreed to spend two percent of their GDP on military spending to increase the effectiveness of the alliance in the face of declining military spending across the alliance, particularly in Europe (Techau 2015, 1). This commitment was created in response to the gradual reduction of American defense spending and infrastructure during the Obama presidency (Richter 2016, 298) and a subsequent need to share the burden of funding NATO (Ibid, 299, Mix 2018, 11). Thus, incorporating military expenditure also allows us to

distinguish more active participants in NATO and which nations had been relying on the United States as "free riders", which in turn helps further to distinguish their score.

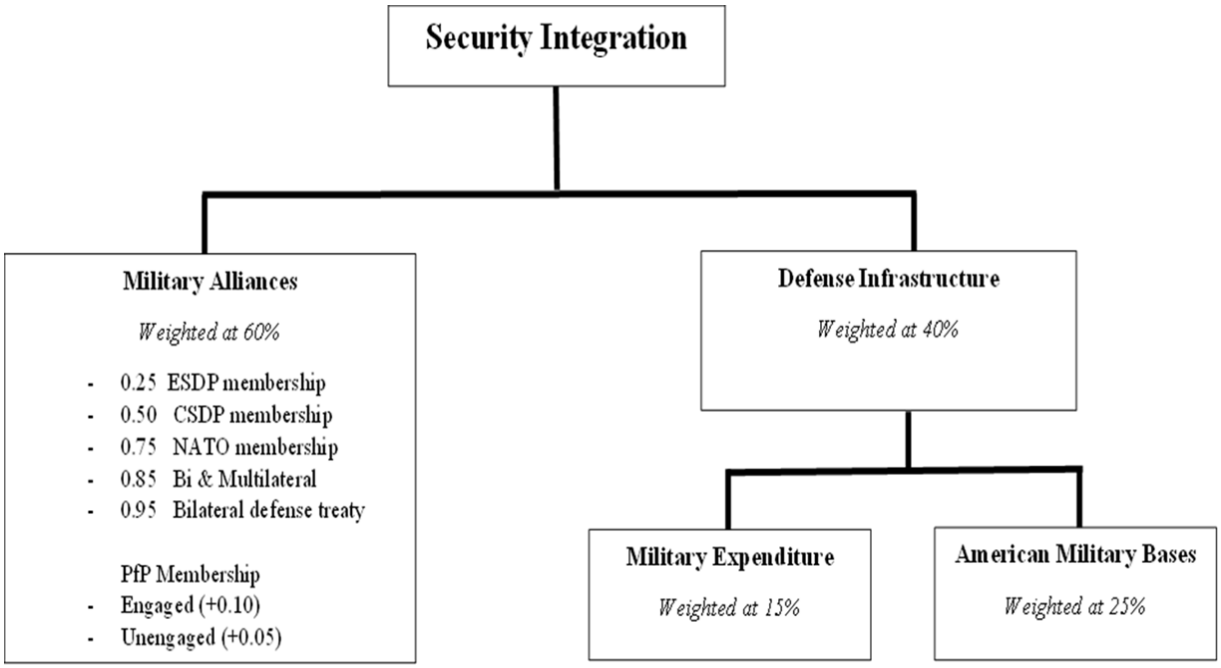
Bases provide the 'muscle' and 'skeleton' of military strategy (Harkavy 2007; Yeo 2011). For Cooley and Nexon (2013), America's network of bases "enmeshes Washington in the domestic politics of its numerous base hosts, shapes bilateral relations, and sometimes becomes a flashpoint for anti-Americanism" (1034). Bases can take many forms; from owned installations, to leased facilities, to shared facilities (Cooley and Nexon 2013, 1036-1037). We will focus solely on 'formal' basing networks; bases established on foreign soil through bilateral negotiations between a host nation and the 'basing nation' (Ibid, 58-59). Specifically, we will count any installation noted in the "real property portfolio" managed by the Department of Defense" (DoD 2007, 6). However, accurate information about bases can be difficult to find. In constructing his database, Vine (2019) noted that he used the Pentagon's Base Structure Reports as the basis for his lists of military bases for the years 1989, 2015, and 2020. Rather than relying solely on his list, and to provide us with enough information for two QCAs, we have gone directly to Vine's source and used the Pentagon's Base Structure Report for the years 2007 and 2015.

Table 3.3 – American Overseas Bases, 2007 & 2015

Country	**2007**	**2015**
Canada	1	1
Japan	130	130
United Kingdom	28	16
Ireland	0	0
Germany	287	127
Spain	2	1
Portugal	10	9
Norway	1	1
Sweden	0	0
Overseas Total	**776**	**502**

Both elements are combined with different weights. 'Military alliances' are weighted at 60%, as alliances are the legal infrastructure on which infrastructure is figuratively and literally built. Within the military alliances section, we have constructed a scoring system like the one we have made for IPD.[14] The 'infrastructure' score is comprised of two subcomponents: military expenditure and American military bases. The base score is higher due to the importance of basing politics and the more concrete nature of base infrastructure compared to military expenditure as a percentage of GDP. It is calculated as a country's American military bases as a percentage of the total number of overseas bases in table 3.3.

Figure 3.6 – Security Integration Model



[14] A country is scored under the benchmark which represents the most comprehensive level of its interconnections. For example, a European country both in NATO and in the EU (hence the CSDP) would only be scored a 0.75 in this section, as NATO membership is a more integrated and active alliance than the CSDP. Membership in a bilateral alliance is scored at 0.95, as it is as close as one can get to a fully integrated military system while retaining sovereignty. Membership in both a bilateral and multilateral alliance is scored at 0.85 since multilateral alliances are less effected by asymmetry in bilateral relationships. We have also used membership in the PfP as a scored bonus for countries which aren't in NATO, namely Sweden and Ireland. We have divided this score into an engaged and unengaged score, to reflect the differences between Sweden and Ireland's relation to NATO (Petersson 2018; Cottey 2018).

CHAPTER 4 – Case Country and Party Overviews

As QCA is a case sensitive methodology, it is important that the facts about each of our cases is clear. In this chapter, we will examine all eight of our case countries and their respective case parties in a separate section. Each section will follow a basic pattern. After describing the electoral and party systems, including our moderation-determining comparison party, we will describe the party funding systems and state of their security integration. Then, we will devote a section specific to each party, describing their origin and political orientation, their recent political and legislative history and their party statues. These sections are designed to impart either the raw numbers needed to calculate and calibrate our conditions, or the case-specific knowledge that explains the calibrations.

4.1 – Canada

The second largest country in the world, sharing the world's longest land border with the United States, Canada is a constitutional monarchy and parliamentary democracy. Canada's Parliament consists of an elected House of Commons and an appointed Senate. Members of the House of Commons are elected under a first-past-the-post (FPTP) system, where the party candidate who receives the plurality of votes in an electoral district, called a riding, is elected to parliament. The party which elects the most members is invited to form government (Marland and Wesley 2020, 338-339). Canadian democracy is a multiparty system. While multipartyism in the United Kingdom, New Zealand or Australia, is more recent and limited, Canada has been multiparty since the 1950s and has had previously minor parties achieve second place. (Paun 2011, 444-445). Our comparison party will be the Conservative Party of Canada, the main right-wing opposition. However, the Conservative Party was only formed in 2003, a merger of the

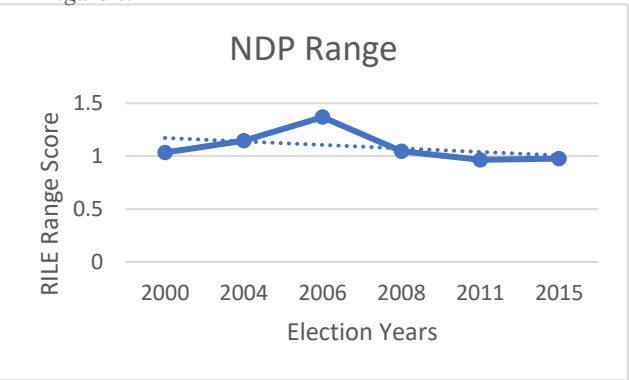
Progressive Conservative (PC) and the Canadian Alliance (CA) parties (Black and Bow 2009, 10). Of these two options, we have decided to use the PC Party to calculate our moderation scores for the year 2000.[15]

Canada is also an interesting case regarding party funding. Among our cases, Canada is the country that has gone through some of the most radical reforms of party funding that align with our time period. Party financing regulations were first introduced in the 1970s (Carty 2015, 92). However, in 2004 and 2007, significant new regulations, banning of corporate and union donations, as well as the ability for these third parties to guarantee loans for political parties, were passed which significantly changed the Canadian political finance landscape. To offset these restrictions on private donations, a per-vote subsidy system was

Table 4.1 – NDP RILE Range Score

Year	NDP	Conservative	Range
2000	-0.834	0.2	1.034
2004	-0.547	0.6	1.147
2006	-0.714	0.655	1.369
2008	-0.38	0.667	1.047
2011	-0.333	0.633	0.966
2015	-0.625	0.351	0.976

Figure 4.1



[15] This may be controversial, as the Alliance was the more electorally successful party in that election, and the most right-wing (Elections Canada 2023a). However, the Conservative Party is a marginally more moderate party than the Alliance Party. This results from former CA leader and first Conservative leader Stephen Harper compromising to get the PCs to agree to a merger where "CA members agreed to abandon their missionary party in favour of a more centrist, classic brokerage party" (Ellis and Woolstencroft 2009, 20). Any increase in moderation would therefore lie more with the choices of the Conservative Party, rather than the NDP. While this phenomenon is an inherent danger in our model, by deliberately choosing a course which shows moderation, we would bias our results towards more moderation, the phenomenon we are trying to study. By contrast, if the Conservative Party is more extreme than the Progressive Conservative Party, then the change between parties would likely be registered as an increase in polarization. Therefore, any subsequent increase in moderation is more meaningful for our results.

implemented. Every quarter, Canadian parties would receive quarterly subsidies based on the number of votes they had received in the previous election (Erickson and Laycock 2009, 109). In 2008, the Conservative minority government attempted to eliminate the per-vote subsidy, spurring a backlash by all four opposition parties, including the NDP (Jansen and Young 2011, 101-102). Despite this temporary retreat, the Conservative Party was able to eliminate the subsidy following their 2011 majority. The final year for the per-vote subsidy was 2015, after which they were entirely phased out (Carmichael and Howe 2014, 16). They were replaced with a program of tax credits, where donors can deduct a portion of their donations from their taxable income. Donors can deduct 75% of their donations up to $400, with the deductions decreasing proportionally past that point (Ibid; Marland and Wesley 2020, 347).

Table 4.2 – State Funding as a Percentage of NDP Party Income, 2001-2016

2001	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**
0%	0%	0%	71.5%	42.6%	76.9%	55.2%	73%
2009	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**
50.6%	54.2%	72.4%	48.6%	39.1%	23.3%	54.7%	3.2%

On the international front, Canada's relationship with the United States is complex and intertwined. It has also been an obsession for many Canadian scholars. The nature of the relationship has been described by Bow and Chapnick (2016) as one of the three 'great debates' that characterize the literature surrounding Canadian American relations (293). However, the authors note that these debates have been superseded by a general recognition that some form of the 'asymmetrical autonomy' perspective popularized by Keohane and Nye (Ibid 304). But what is the security structure through which this asymmetry operates? Since the start of the Cold War, Canada has been increasingly drawn into the orbit of the United States, in contrast to its pre-WWII

cooperation/dependence on the 'mother country', the United Kingdom (Thompson and Randall 2008, 171). Canada was one of the founding members of NATO, adopting a pro-Western stance "out of fiscal reality as well as ideology" (Ibid, 177-178). Membership was at least partially used as a method to balance Canada's relationship with America vis-à-vis the presence of other alliance members (Ibid, 179). By 1957, Canada had joined the North American Aerospace Defense (NORAD) and integrated the Canadian and American air defense systems and creating a system in which both Canadian and American NORAD commanders would coordinate operational defense policies (Thompson and Randall 2008, 185-186). In this respect, Canada is highly integrated into a security network with the United States.

Our case party, the NDP was founded by primarily by socialists as the Co-operative Commonwealth Federation (CCP) in 1933, although the 1956 Winnipeg Declaration moved the party away from advocacy of outright socialism and towards more moderate forms of social democracy (Erickson and Laycock 2016a, 14). In 1961, the CCF joined with the Canadian Labour Congress to create a new electoral party known as the New Democratic Party (NDP) (Whitehorn 2006, 94). However, the party's fortunes would fluctuate through the 1990s (Erickson and Laycock 2009, 100-101). After a disappointing result in 2001, the party elected Jack Layton as its leader. In the 2004 election, the NDP gained seats and the ability to support the Liberal minority government, even helping to pass a so-called "NDP Budget in 2005". After the Conservative Party formed minority governments in 2006 and 2008, the NDP increased its seat count but no longer influenced government policy. The party rocketed to second place in the 2011 election against a Conservative majority, but Layton passed away due

to cancer 113 days after the election. He was replaced by Tom Mulcair, who saw the party lose its second-party status in 2015.

Table 4.3 – NDP Electoral and Government Strength						
Electoral Strength						
Election Year	*1997*	*2000*	*2004*	*2006*	*2008*	*2011*
Vote Percentage	11%	8.5%	15.7%	17.5%	18.5%	30.6%
Government Strength						
Election Year	*1997*	*2000*	*2004*	*2006*	*2008*	*2011*
Overall Seat Percentage	7%	4.3%	6.2%	9.4%	12%	33.4%
Relevant Seat Percentage	0%	0%	12.3%	0%	0%	0%

Beginning in 1995, leadership selection became a two-step process with regional party primaries followed by a convention vote of delegates (Courtney 2015). The party moved to a OMOV vote system for party leader for the 2002-2003 leadership election (McGrane 2019, 34). One quarter of the vote share was allocated to affiliated labour organizations. This requirement was dropped in 2012, with the party becoming the last major Canadian party to adopt full members only OMOV (Cross 2014, 176). Candidate selection in Canadian politics is relatively decentralized, with local constituencies selecting candidates to run in this constituencies. In the NDP, the party can also freeze nominations to ensure that local party 'search committees' recruit enough candidates from marginalized communities, with the committees needing to account for any unsuccessful searches to the national party (Pruysers and Cross 2016, 793).

4.2 – Japan

Japan's modern political history begins with the construction of a post-war constitutional monarchy. Post-war Japanese politics in the 20th century came to be dominated by right-wing Liberal Democratic Party (LDP) held power continuously for

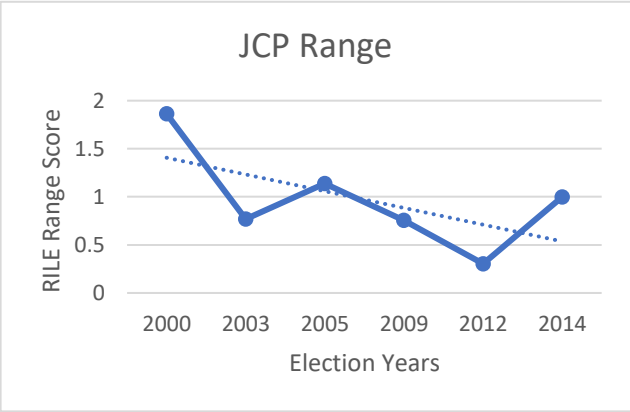
four decades (Schoppa 2011, 3). While the party is defined by a history of factionalism and several broad ideological trends, the more explicitly nationalist and right-wing faction of the party has been the dominant faction since the early 2000s (Harris 2020, 109), which aligns excellently with the purposes of our study.

The LDP's complete dominance lasted until 1993, when the LDP briefly lost power and electoral reform was implemented. Japan's multi-member districts were abolished in favour of single-member districts. These were combined with a form of mixed proportional system. This mixed system is utilized in both the lower house of the Diet, called the *shuugi'in*, or House of Representatives, and the upper house, the *sangi'in*, or House of Councillors. The specifics are different for each House. The House of Representatives has 465 members, 295 of which are elected from single member districts while 180 are elected by party list PR. The House of Councillors consists of 242 members, 196 of whom are elected from lists from the prefectures while 96 are elected from at-large party lists. Members serve for six-year terms and half the seats are contested every three years (Hayes 2017, 43).

Table 4.4 – JCP RILE Range Scores

Year	JCP	LDP	Range
2000	-0.996	0.866	1.862
2004	-0.968	-0.2	0.768
2006	-0.996	0.143	1.139
2008	-0.987	-0.231	0.756
2011	-0.254	0.05	0.304
2015	-0.999	0	0.999

Figure 4.2



Changes to the electoral system were not the only reforms put in place in Japan in 1994. That year was also the year that the Law for Government Subsidies for Political Parties, the Seito Josei Ho, was passed in the Diet. It establishes a system by which the national government must raise a sum equal to 250 yen multiplied by the entire population of Japan to be distributed among political parties (Carlson 2010, 392). To be eligible for this subsidy, parties must have at least five members in the Diet or "exceed 2 percent of the vote-shares in the previous election for parties that have at least one Diet member" (Ibid, 395). The subsidy generally accounts for about half of party finances (Ibid, 397-398). However, the Japanese Communist Party refuses to accept these subsidies (Ibid, 405).

Japan's national security policy is intimately intertwined with that of the United States. American soldiers were stationed across 2,800 bases for an indefinite period with no obligation to come to Japan's aid if were attacked in the post-war period (Packard 2010, 93). In 1960, a revised treaty was signed guaranteeing American protection in case of an attack on Japan and forcing the Americans to consult with the Japanese government on any changes in their base policies (Ibid, 94). As Hughes (2007) notes "Japan and the US predicate their security treaty upon a grand strategic bargain: Japan accepts US military protection in return for providing bases to facilitate the projection of US military power in East Asia" (327). In 1997, new guidelines officially expanded the scope of the treaty to include consideration of "situations in areas surrounding Japan" (Defense of Japan 2016, 230). These guidelines were further updated in 2015 after two years of negotiation to increase the "synergy" and "flexib[ility]" of the alliance through increased operational coordination and cooperation with other regional partners (Ibid, 231-232).

The significant presence of American security arrangements in Japanese national defense is partly a result of Japan's post-war 'peace constitution', whose ninth article renounced war. However, the text was made more ambiguous to allow for the possibility of limited, non-aggressive rearmament for self-defence (Dower 2000, 394-395). While Hughes (2007) noted that the Japanese constitutional interpretation that prevented collective self-defence acted as a hedge against American military hegemony and entrapment (328), in 2014, the LDP government of Shinzo Abe announced a reinterpretation of Article 9 in which an armed attack on a Japanese ally could constitute an existential threat to Japan, meaning that a subsequent armed response would be a justified act of self defense (Defense of Japan 2016, 165-166).

The JCP (*Nihon Kyousantou*) was founded in 1922 (Langer 1972, 4). While an offshoot of the Comintern, Berton and Atherton (2019) describe the party as growing out of Japanese left-social movements that were "an amalgam of Marxism, Christian humanism, socialism and anarcho-syndicalism" (3). As a firmly anti-Imperial party, [the JCP became quite popular in the immediate aftermath of Japan's surrender and the party's legalization and made strong roads inside the labour movement (Dower 2000, 255-256, 270). Despite this promising set of circumstances, forces both external and internal would blunt the party's rise. The party would decline due its subordination to the Comintern, including a brief period as an insurrectionary party, and anti-Communist pressure from the US (Ibid, 73-77, 434-436; Langer 1972, 19-20). Increasing disaffection within the party led to cutting ties with the Soviets and the Chinese in 1964 (Berton and Atherton 2019, 105).

Building on these developments, the trajectory of the modern party was set in 1968. The party achieved the height of its success in the 1970s (Day 2010, 547). Ever since these highs, the party has been slowly declining in party strength. The major exception to this trend was the period between the 1996 and 2000 House of Representative elections. (Berton and Atherton 2018, 54). Miyamoto resigned in 1997 and was replaced first by Fuwa Tetsuzo and then Shii Kazuo in 2000 (Day 2010, 543). Fuwa, although giving up the top job to Shii, remained a member of both the Central Committee and Standing Executive Committee, and is generally considered the party's top theoretician (Ibid, 551).

Fig. 4.5 – JCP Electoral and Government Strength						
Electoral Strength						
Election Year	*1996*	*2000*	*2003*	*2005*	*2009*	*2012*
Vote Percentage	13.1%	11.2%	7.8%	7.3%	7%	6.1%
Government Strength						
Election Year	*1996*	*2000*	*2003*	*2005*	*2009*	*2012*
Overall Seat Percentage	5%	4%	2%	2%	2%	2%
Relevant Seat Percentage	0%	0%	0%	0%	0%	0%

The question of IPD in the JCP is an interesting one, as the party still retains a belief in the organizing principle of democratic centralism (Berton and Atherton 2019, 11). However, the democratic election of cadres has been called a "fiction" and that the party "continues to be run dictatorially by the Chairman of the Executive Committee (formerly the General Secretary)" (Ibid). For example, while the Party Congress is declared by the party constitution to be the supreme body of the party which elects the central committee, the central committee itself has the right to determine the method of selecting delegates and their "ratio" (Japanese Communist Party 2000, s. 4.19). This

affects both leader and candidate selection in the party. The party leader is elected from within the central committee (Japanese Communist Party 2000, s. 4.23).

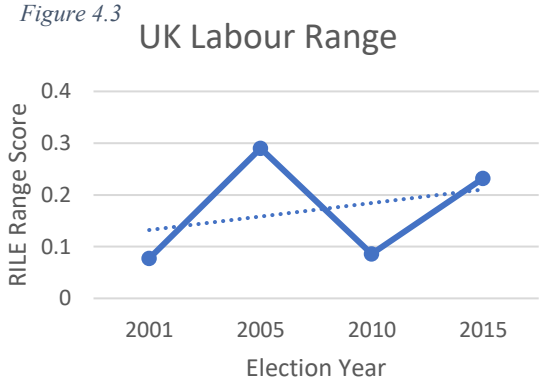
4.3 – United Kingdom

The United Kingdom forms the last of our single party cases. Like Canada, the UK is a constitutional monarchy, and its Parliament is composed of an elected House of Commons and an unelected upper house, in this case the House of Lords. The House of Commons is elected using a FPTP voting system, with members being called MPs. It is the last of our case countries to have a pure FPTP voting system. As a single case country, it is quite simple to contrast the British Labour Party with its only competitor for government, the Conservative Party. While the two-party system has come under strain since the 1997 election, with the rise of minor national parties like the Liberal Democrats and UKIP, as well as regional parties, British politics has traditionally been strongly two party (Paun 2011, 443). Furthermore, despite the increasing prominence of third-parties, British governments have generally been dominated by Labour or the Conservatives. Apart from the Conservative-Liberal Democrat coalition of 2010, the first coalition government since 1918, all post-war governments have been either Liberal or

Table 4.6 – UK Lab. RILE Range Scores

Year	Labour	Conservative	Range
2000	-0.361	-0.438	0.077
2005	-0.59	-0.3	0.29
2010	-0.287	-0.373	0.086
2015	-0.225	0.007	0.232

Figure 4.3



Conservative (Cracknell et al 2022, 11-12). Unlike the Canadian example, this two-party division is more distinctly a division of left and right historically, without a strong centrist option (Johnston 2013, 300).

State party funding in the United Kingdom is only a recent development and still largely limited. In 1975, funding for opposition parties, known as 'Short money' was introduced by the British Parliament, and comprises funding for parliamentary work, subsidies for the Leader of the Opposition's office, and travel and expense subsidies. This funding is only available to parties that have either two elected seats, or one seat and 150,000 votes at the previous general election, as well as have sworn an oath to the Crown (Kelly 2022, 7). In 2001, a two-million-pound policy development fund was created to be distributed to parties (Koß 2011, 97). As a result, one can see a large jump in the percentage of Labour Party funds coming from the government after their defeat in the 2010 elections, as seen in figure 3.6.

Fig. 4.7 – State Funding as a Percentage of UK Labour Party Income, 2001-2016

2001	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**
0%	0%	0%	0%	0%	1.8%	1.4%	1.3%
2009	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**
3.7%	6.7%	25.5%	20.2%	20.7%	16.7%	13.5%	12.2%

The Labour Party's origins lie with the Labour Representation Committee (LRC), founded in 1900 by disaffected labour movement members of the Liberal Party searching for a more effective political vehicle to promote the interests of organized labour. The LRC would adopt the name Labour Party for the 1906 election (Callaghan 2007, 1-2). First forming government several times in the 1920s and 1930s, the party's greatest victory came under Clement Attlee. Under Attlee's premiership from 1945 until 1951, the United Kingdom was transformed into a modern welfare state, exemplified by the

creation of the National Health Service under his mandate (Bew 2017, xi-xii).

Fig. 4.8 – UK Labour Party Electoral and Government Strength				
Electoral Strength				
Election Year	*1997*	*2001*	*2005*	*2010*
Vote Percentage	43.2%	40.7%	35.2%	29%
Government Strength				
Election Year	*1997*	*2001*	*2005*	*2010*
Overall Seat Percentage	63.4%	62.5%	55%	39.7%
Relevant Seat Percentage	100%	100%	100%	0%

The premiership of Margaret Thatcher, her neoliberal policies, and her firm victories over the Labour Party mark the beginning of the modern Labour Party. The party saw successive defeats under more traditionally left leaders in the 1980s, leading to the recognition of a need for greater change (Diamond 2021, 143, 145, 153). The traditional policies and party structures were not working and were reformed by leader Tony Blair to modernize social democracy in face of the decline of the welfare state (Ibid, 275-276). Blair was elected party leader in 1994, winning a majority for Labour in 1997 (Ibid, 179). He would repeat this feat in both 2001 and 2005. Most controversially, Blair brought the UK into the Iraq War (Ibid, 224-228). Blair would step down from the leadership in 2007. He would be followed by his finance minister, or Chancellor of the Exchequer, Gordon Brown whose popularity would precipitously decline soon after his ascension (Kettell and Kerr 2008, 492). Under Brown's leadership, Labour would lose government to David Cameron's Conservative coalition with the Liberal Democrats in 2010. The party would move left under Ed Miliband, who was elected leader in

September of that year (Diamond 2021, 333).[16] The party would move further left under Miliband's successor Jeremy Corbyn, who was elected leader in 2015, both in continuity with Miliband's left-ward shift and in reaction against Miliband's establishment credentials (Ibid, 341).

Leadership elections in the Labour Party were restricted to elected members of Parliament before 1981, when MPs, local constituencies, and the affiliated societies each gained delegated votes weighted at 40, 30, and 30 percent respectively (Bale and Webb 2014, 14). Reforms in 1993 equalized the weight of the vote between each section and introduced OMOV for both society delegates and constituencies (Ibid, 15). Party primaries were introduced after Ed Miliband's election in 2010 (Webb 2021, 203-204). Candidate selection at the start of the millennium follows a similar logic. After reforms in the mid-90s, party members in local constituencies can vote for candidates using OMOV after a process of party vetting that involved local executives drawing up a short list of candidates from an approved list, which is then accepted by the National Executive Council of the Labour Party, who hold ultimate veto power over any choice (Hopkins 2001, 352).

4.4 – Ireland

The Republic of Ireland represents the twenty-six counties of Ireland, minus

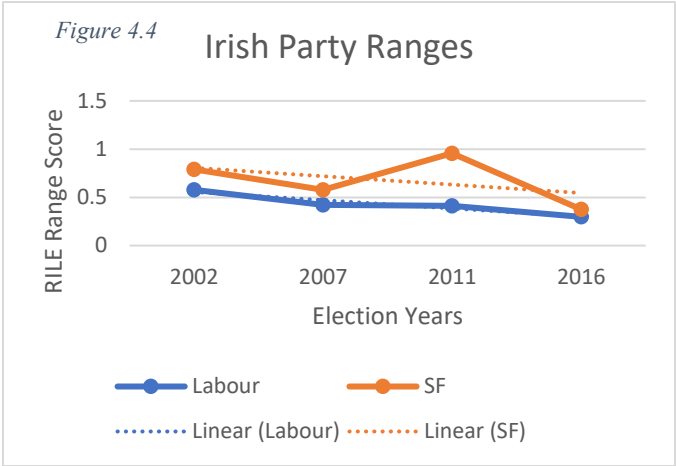
Table 4.9 – Irish RILE Range Scores

Year	Lab	SF	FF	Lab Range	SF Range
2002	-0.784	-0.997	-0.206	0.578	0.791
2007	-0.837	-0.993	-0.414	0.423	0.579
2011	-0.544	0	-0.957	0.413	0.957
2016	-0.727	-0.804	-0.429	0.298	0.375

[16] Despite his more left-wing posturing, Miliband was widely considered to be a career politician who lacked the political instincts and the imagination to fend of threats to Labour seats from UKIP vote-splitting or the rise of the Scottish National Party in Scotland and effectively challenge the Conservative coalition, resulting in a disappointing 2015 election result that saw the party rise by only a single point in the polls and lose most of their seats in Scotland (Ibid, 337-339).

the six counties that constitute Northern Ireland. The Irish parliament, or Oireachtas, is divided into two Houses, of which the lower house is the more politically relevant. The lower house is called the Dáil Éireann while the upper house is the Seanad Éireann (Gallagher 2018, 152). The Dáil was comprised of 166 seats for every election between 1981 and 2011, decreasing to 158 seats for the 2015 election (Appendix 2c 2018, 320). A member of the Dáil is called a Teachta Dála, or TD (Coakley and Gallagher 2018, 20). Ireland's electoral system is unique in its use of the proportional representation – single transferable vote system (PR-STV). It is a rare system; only Malta and Ireland use it to elect national lower houses, Ireland since 1921 (Farrell and Sinnott 2018, 92). While more proportional than first-past-the-post in Canada and the UK, it is less proportional than other PR systems (Ibid, 99).

Figure 4.4



The Republic of Ireland represents the twenty-six counties of Ireland, minus the six counties that constitute Northern Ireland. The Irish parliament, or Oireachtas, is divided into two Houses, of which the lower house is the more politically relevant. The lower house is called the *Dáil Éireann* while the upper house is the *Seanad Éireann* (Gallagher 2018, 152). The Dáil was comprised of 166 seats for every election between 1981 and 2011, decreasing to 158 seats for the 2015 election (Appendix 2c 2018, 320). A member of the Dáil is called a Teachta Dála, or TD (Coakley and Gallagher 2018, 20). Ireland's electoral system is unique in its use of the proportional representation – single

transferable vote system (PR-STV). It is a rare system; only Malta and Ireland use it to elect national lower houses, Ireland since 1921 (Farrell and Sinnott 2018, 92). While more proportional than first-past-the-post in Canada and the UK, it is less proportional than other PR systems (Ibid, 99).

The Irish party system was a two-and-a-half party system until the influx of new parties in the 1980s (Murphy and Farrell 2002, 244). The nature of the 'two parties' in this system makes the selection of a right-wing party to compare our case parties quite difficult. The two largest parties in Irish politics, Fianna Fáil and Fine Gael, both grew out of the anti-Treaty and pro-Treaty camps of the Irish Civil War (Weeks 2018, 111). Both are generally considered to be on the right of the political spectrum (Ibid, 111-112). However, Fianna Fáil has been considered more conservative than Fine Gael since the 1960s, with increased convergence between the parties since the 1980s (Weeks 2018, 112). Of these two parties, we have chosen Fianna Fáil to be our comparison party. Fianna Fáil is one of the longest serving governing parties of the 20th century (Carty 2015, 44-45). There is only one case of Labour joining a coalition with Fianna Fáil, in 1992, compared to their usual partners, Fine Gale (Ibid, 181-182).

Irish political parties receive three sources of government revenue: exchequer funding, the *Oireachtas* cost, and the Parliamentary Activities Allowance (Weeks 2018, 123-124). Ireland's political financing landscape was revolutionized by the 1997 and 1998 Electoral Acts which established the introduced exchequer funding. (Murphy and Farrell 2002, 229). However, Ireland has only required full disclosure of party income from all sources through the Standards in Public Office Commission since 2015 (SIPO 2023). Therefore, Ireland is the case for which we have the worst data on hand to

calculate our party funding numbers. Apart from the officially catalogued party accounts, we have also been able to find select party accounts from specific years. In the case of Sinn Fein, this gives us some numbers to work with to calculate some average for the years 2000-2008, as the party lists its yearly financial accounts and statements from 2007 until the present day (Sinn Fein 2023). Unfortunately, there is no such publicly available information for the Labour Party.[17]

Table 4.10 – State Funding as a Percentage of Irish Labour and Sinn Fein Party Income, 2001-2016

Irish Labour Party							
2001	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**
/	/	/	/	/	/	/	/
2009	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**
/	/	/	82.2%	/	88.2%	94.27%	94.52%
Sinn Fein							
2001	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**
/	/	/	/	/	76.6%	68.7%	88.4%
2009	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**
71%	/	89.1%	89.1%	89.1%	83.3%	88.4%	89.3%

Ireland is one of a small group of so-called 'European neutrals', smaller European states that pursue an official policy of neutrality. This has been Ireland's policy since the Second World War (Jesse 2006, 8). It neglected to join NATO in 1949, over concerns around Northern Ireland and policy independence (Cottey 2018, 156). During the Cold War, Irish neutrality become entrenched both institutionally and socially, with Irish policy focusing on international peacekeeping and nuclear disarmament (Ibid, 157). However, Jesse (2006) explains the during the Cold War, Ireland's neutrality was different from other 'neutrals' like Sweden, in that Ireland did not engage in 'armed

[17] To solve this issue, we have unfortunately used the 2012 Labour Party income as the baseline for our 2001-2008 numbers.

neutrality' (15). The country's non-membership in military alliances, 'military neutrality', continued in the post Cold War period. The country was the last neutral to join the PfP in 1999 (Cotty 2018, 159-160). While Ireland has become quite engaged with the CSDP, its interactions with NATO through the PfP have been described as a "low profile partnership" (Ibid, 151)

4.4.1 – The Labour Party

The Labour Party represents the 'half' in the 'two and a half' party system that dominated the Republic of Ireland for most of its history. While government alternated between Fianna Fail and Fine Gael, the Labour Party was alternated between terms in opposition and terms as a junior partner in a coalition government. Originating from the trade unions in 1912, the party was unable to overcome the cleavage of the civil war (Weeks 2018, 113). The party formed a coalition government with Fianna Fail in 1992 but was dropped from the coalition in 1997 following an election loss. Leader Dick Spring was replaced with Ruairí Quinn who refused to run joint campaign with Fine Gael and was left out of government when Fianna Fail continued. In 2007, the new leader Pat Rabbitte ran a joint campaign with Fine Gael's Enda Kenny, which ultimately failed, leading to Rabbitte's replacement by Eamon Gilmore. The 2008 financial crisis and

Table 4.11 – Irish Labour Party Electoral and Government Strength

Electoral Strength				
Election Year	*1997*	*2002*	*2007*	*2011*
Vote Percentage	10.4%	12.7%	12.1%	19.5%
Government Strength				
Election Year	*1997*	*2002*	*2007*	*2011*
Overall Seat Percentage	10.2%	12.7%	12%	22.3%
Relevant Seat Percentage	0%	0%	0%	32.7%

subsequent Eurozone crisis allowed the party to come to power in a Fine Gael coalition in 2011, but the party subsequently suffered its worst defeat in 2016.

The Labour Party has been a comparatively early adopter of IPD measures in relation to leader selection, putting in place the principle of OMOV, as opposed to selection by the parliamentary party, in 1989, but were not actually implemented until Rabbitte's election in 2002 (Weeks 2018, 122). The same year saw a change in the candidate selection process. Traditionally, the National Executive Council was tasked with overseeing candidate selection and the overall selection strategy. This is still the case today. However, in 2002, the Organizing Sub Committee (OSC) was given the power to decide the number of candidates to be selected and can also decide on gender or geography-based criteria for candidate selection (Weeks 2008, 50; Reidy 2016, 61). However, this centralizing power is counter-balanced by using OMOV for candidate selections (Weeks 2008, 50).

4.4.2 – Sinn Fein

The party name Sinn Fein has a long history in Irish politics, originally being the name of a revolutionary nationalist party founded in 1905. Sinn Fein won a resounding majority of Irish seats in the 1918 parliamentary election but instead established a separate Irish parliament, the Irish Dail, sparking the Irish War of Independence (Coakley 2018, 30-31). The success of the war ironically spelt the end of the original Sinn Fein, split over the decision to end the war with a treaty establishing Ireland (minus the north) as a dominion (Weeks 2018, 111-112). The modern party known as Sinn Fein has its origins in left-wing remnants of the IRA who attempted a low-level insurgency

throughout the 1940s and 50s and became notorious with the start of the Troubles in 1968 (Finn 2021, loc 475, 860).

Sinn Fein' placed political struggle on equal terms with armed struggle in 1981 (Whiting 2016, 543), and became entirely parliamentary at the end of the Troubles (Ibid, 544, 548). In 2001, Sinn Fein became the premier party among the Catholic nationalist population in Northern Ireland. With its position in the north secure, the party began to focus more attention on the south (Frampton 2009, 133). The party, and many commentators, expected that Sinn Fein could seriously improve its standing in the 2007 election, with some estimates as high as fifteen seats. Instead, the party lost some seats, largely in part to controversies in the campaign from the party's relationship to the IRA (Frampton 2009, 181-182). Despite these setbacks, the 2011 election saw large gains for the party, tripling its seat count from 2007 (Little 2011, 1304). This success would continue in the 2016 election. (Barrett 2016, 426).

Table 4.12 – Sinn Fein Electoral and Government Strength				
Electoral Strength				
Election Year	*1997*	*2002*	*2007*	*2011*
Vote Percentage	2.5%	3%	2.4%	9.9%
Government Strength				
Election Year	*1997*	*2002*	*2007*	*2011*
Overall Seat Percentage	0.6%	3%	2.4%	8.4%
Relevant Seat Percentage	0%	0%	0%	0%

Gerry Adams was selected party leader in 1983 and remained leader during the entire period of our study (Whiting 2016, 551). While the party leader's position comes under review at every party convention (*Ard Fheis*) should anyone decide to run against Adams, the party's leadership selectorate is comparatively exclusive. Only the delegates

to the national convention are allowed to vote (Rafter 2016, 435). For candidate selection, the party gives its national executive, known as the *Ard Comhairle*, immense power, including the power to deselect candidates and suspend OMOV in cases where it suspects infiltration by 'ghost members', the party generally allows local branches to select candidates using OMOV (Weeks 2008, 51).

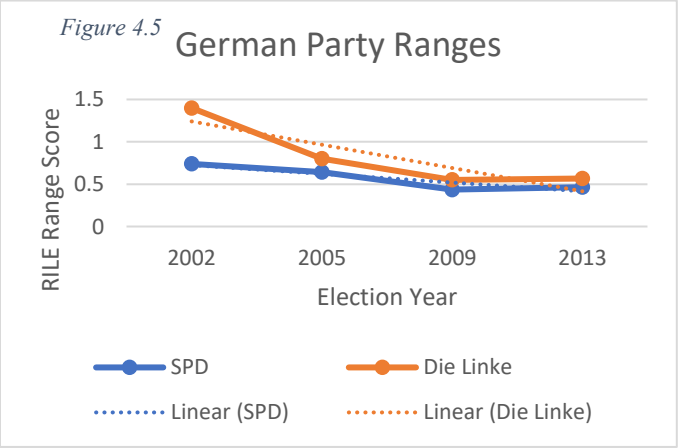
4.5 – Germany

Germany present development is a result of its post-war history and Cold War division. Its reunification marked the effective end of the Cold War and the triumph of the West German political system, which became the political system for the united country. The federal, parliamentary, and electoral systems of West Germany were extended to the former East (Schweiger 2019, 19). Germany has a federal system, in which power is divided between one national government and governments of the sixteen German states, or Land. The German Parliament is comprised of two houses. The most important is the Bundestag, which is responsible for passing legislation and selecting the

4.13 – German RILE Range Scores

Year	SPD	Linke	CDU	SPD Range	Linke Range
2002	-0.339	-0.999	0.4	0.739	1.399
2005	-0.842	-0.999	-0.2	0.642	0.799
2009	-0.873	-0.987	-0.437	0.436	0.55
2013	-0.898	-0.999	-0.433	0.465	0.566

Figure 4.5



Chancellor. The second house is called the Bundesrat, which represents the sixteen Länder (Rittlemeyer et al 2020, 2-3).

The size of the Bundestag is variable due to the electoral system. Germany operates under a mixed-member proportional (MMP) system. Each voter receives two votes. The first vote (*Erststimme*) allows them to select a candidate in a single-member constituency while the second vote (*Zweitstimme*) is for a party list for the respective Land (Roberts 2006). Votes are distributed according to a party's vote percentage, with candidates from party lists being added to the Bundestag alongside successful constituency candidates until the total number of seats is roughly proportional. However, this proportional rule only becomes active if a party has won over five percent of the vote nationally and/or has won three or more constituency seats (Ibid, 14-15). This system has been in place since the passing of the Electoral Law in 1956 (Ibid, 19).

German politics is centered two main parties of the right and the left. Furthermore, Germany's right-wing party, the Christian Democratic Union (CDU), has been the major governing party for most of the post-war period (Carty 2015, 44-45). In the 1970s and 80s, party competition revolved around the CDU and SPD, with the smaller Liberals as the 'half' party until the rise of the Greens in the late 80s and early 90s (Debus et al 2021, 251-252). However, the twenty-first century has seen the German party system morph for a four-party system into a six-party system (Ibid, 247). Despite this, the CDU retained both strong electoral support and a strong bargaining position for coalition forming during this period, making it the obvious comparison party (Ibid, 254).

Germany's system of state funding to political parties first introduced in 1959 (Koß 2011, 94). However, firm regulations requiring the disclosure of these funds was

not passed until 1967, and even after there existed some loopholes (85). Despite this fact, Koß (2011) notes that Germany has the "best" regulations in terms of transparency out of itself, Sweden, France and Britain (Ibid). This has been paralleled by our own research, in which we were able to easily gather our figures from the records of the Bundestag (Deutscher Bundestag 2011; Deutscher Bundestag 2021). The regulations themselves take the form of a combination of flat grants, matching funds, and tax credits (Ibid, 93).

Table 4.14 – State Funding as a Percentage of SPD and Die Linke Party Income, 2001-2016

SPD							
2001	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**
29.7%	30.8%	33%	27.3%	26%	25.7%	27.7%	26%
2009	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**
22.9%	26.5%	27.2%	30.1%	29.1%	30.1%	32%	38.9%
Die Linke							
2001	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**
35.4%	32.7%	39.4%	37.5%	37.9%	37.8%	39.3%	37.6%
2009	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**
39.3%	38.9%	42.2%	41.2%	40.4%	39.5%	39.2%	38.9%

Many elements of German party organization is the result of legislation, resulting in many commonalities among all parties. From a legal perspective, the head of a party is the "*Parteivorsitzende/-r",* or party chairperson, which must be an elected position (Detterbeck and Rohlfing 2014, 78). The *Political Parties Act* (*Parteiengesetz*) specifies that this election must be conducted through a secret ballot by delegates at a party convention (Ibid, 80). Die Linke elects two party chairpeople, one of whom is always a woman (Detterbeck and Rohlfing 2014, 59). These laws also legislate that local and regional party conventions are to play a role in selecting candidates for elections. Due to Germany's MMP electoral system, candidates running in districts are selected at the local level, while party list candidates are selected at the regional level (Detterbeck 2016, 847).

Germany's defense and security policies have been shaped by the impact of its defeat in the Second World War. The Allies sought to demilitarize and de-arm the country, with no provisions for defence (Longhurst 2004, 27). However, the imperatives of the burgeoning Cold War changed this calculus. The liberal democratic and capitalist West Germany was incorporated into the Western security sphere through NATO membership, while the communist East was incorporated into the Warsaw Pact (Ibid, 29). In response, the CDU West German Chancellor Adenauer began promoting a policy of rearmament and Western security integration in the late 1940s and early 50s, which was opposed by the SPD at the time (Ibid, 30-31). Despite these protests, West Germany entered NATO in May 1955 (Ibid, 34). Germany still relied heavily on Western support for its defence even with rearmament. Germany followed a "principled multilateralism", in which the German army (Bundeswehr) would not engage in military missions outside of alliance or self-defence while the American military presence to act as deterrence for Soviet aggression (Pradetto 2006, 21-22). However, since the 1990s and the turn of the millennium, Germany has begun implementing a more assertive foreign policy while America has begun downsizing its military presence in Europe. In 2004, the American government suggested that the US military presence in Western Europe be reduced by half (Yeo 2011, 101). While there were 775 military bases in Germany in 1989 (Vine 2019), according to our base structure reports, there were 287 bases in Germany in 2007 but only 127 in 2015.

4.5.1 – Sozialdemokratische Partei Deutschlands (SDP)

The Social Democratic Party holds an important spot in the history of left-wing politics, both revolutionary and reformist. Founded in the late 1800s, by the turn of the century, the party had come to dominate the Second International, the global alliance of Marxist, socialist and workers parties. However, more radical members, including the precursors of the German Communist Party, split from the party at the start of the First World War (Nettl 1965, 68-71). The shift away from a radical socialist position was further entrenched in the late fifties when, after a crushing electoral victory by the CDU in the 1957 West German Bundestag elections, the party shifted away from its mass-party, union-based roots to become a "catch-all party capable of winning power" (Reed 2008, 47). In 1966, the SPD was able to enter government through the first (of several future) 'grand coalitions' with the CDU (Roberts 2006, 20). This prefigured the elevation of SPD chairman Willy Brandt to the position of Chancellor in a coalition with the liberal FDP in 1969 (Chryssogelos 2017, 63).

Table 4.15 – SPD Electoral and Government Strength

Electoral Strength				
Election Year	*1998*	*2002*	*2005*	*2009*
Vote Percentage	40.9%	38.5%	34.2%	23%
Government Strength				
Election Year	*1998*	*2002*	*2005*	*2009*
Overall Seat Percentage	40.9%	38.5%	34.2%	23%
Relevant Seat Percentage	86.4%	82%	49.5%	0%

4.5.2 – Die Linke

Die Linke is a relatively recent political party, but one that has deep connections to the past. The party was formed in 2007 as the merger of two separate parties, the Party of Democratic Socialism (PDS) and the WASG (Coffee and Plassa 2010, 722, 724). The

PDS was the successor of the ruling party of East Germany, called SED (Ibid). Unlike many such successor parties, the PDS remained a radical left party (Chiocchetti 2017, 81). The WASG was founded in 2005 primarily by former SPD members and trade unionists was led by the former SPD Finance Minister Oskar Lafontaine (Coffe and Plassa 2010, 723; Hough 2010, 142). Both parties contested the 2005 German federal

Table 4.16 – Die Linke Electoral and Government Strength				
Electoral Strength				
Election Year	*1998*[18]	*2002*	*2005*	*2009*
Vote Percentage	5.1%	4%	8.7%	11.9%
Government Strength				
Election Year	*1998*	*2002*	*2005*	*2009*
Overall Seat Percentage	5.1%	4%	8.7%	11.9%
Relevant Seat Percentage	0%	0%	0%	0%

election together, before merging (Chiocchetti 2017, 81). The party is a big tent of left-wing ideologies (Hough 2010). However, the party and its policy seem to be guided by three 'guidelines': criticism of neoliberalism, "radical pacif[ism], and populist rhetoric (Ibid, 147).

4.6 – Spain

Spain transitioned to democracy between 1975 and 1982 in a "pacted break" between the Francoist establishment and left-wing opposition parties, turning the country into a constitutional monarchy and parliamentary democracy (Magone 2018, 12). The Spanish Parliament is known as the Cortes Generales, a bicameral parliament composed

[18] Much like our foreign policy RILE scores in chapter two, section 2.6.5, the 1998 and 2002 election statistics are those of the PDS.

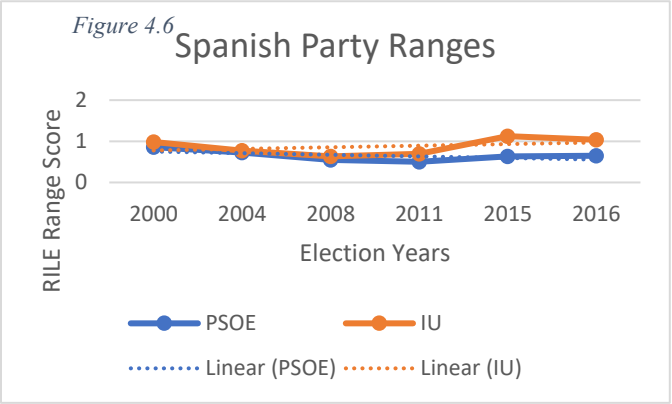
of a lower house called the Congress of Deputies (Congreso de Deputados) and an upper house called the Senate (Senado) (Field 2021, 545). Spain's national electoral system uses proportional representation with the D'Hondt method to calculate the distribution of seats. Spain is noted to be one of the most disproportional systems among PR and the D'Hondt method countries, as the country has many small constituencies and the small number of elected representatives in the Cortes (Magone 2018, 108). Furthermore, Spain uses a closed-list proportional representation (CLPR) system. Party lists for voters are determined and ordered by the parties themselves before the election, with no opportunity for individual voters to vote for or rank individual candidates. As a result, CLPR systems tend to centralize power among party leaders and the party selectorate, as candidates attempt to curry favour with party officials to be put on a favourable spot on the party list (Jalali and Rodrigues Sanches 2023, 236; Jaime-Castillo et al 2018, 230).

From 1993 until 2014, the Spanish party system was noted to be an "adulterated two-party system", in which party competition is centered around two main parties with numerous others unable to challenge them (Magone 2018, 144). While always being a multiparty system, with the presence of many regional parties,

4.17 – Spanish RILE Range Scores

Year	PSOE	IU Pos	PP	PSOE Range	IU Range
2000	-0.867	-0.995	-0.009	0.858	0.986
2004	-0.949	-0.997	-0.222	0.727	0.775
2008	-0.911	-0.997	-0.363	0.548	0.634
2011	-0.783	-0.973	-0.281	0.502	0.692
2015	-0.497	-0.99	0.135	0.632	1.125
2016	-0.516	-0.9	0.135	0.651	1.035

Figure 4.6



competition for government was limited to the PSOE and the Partido Popular (PP) or the People's Party (Ibid). The PP was founded as an explicitly conservative party in 1977, and while it has become more centrist and less radical since 1989, the party is still culturally a party of the Spanish right, dedicated to national unity and a Catholic identity (Ibid, 122). However, this two-party system would shift into a multiparty system quite dramatically by 2016, the end of study. Spain is also an outlier among proportional Western European countries in its historic lack of coalition governments. Since the transition to democracy, there were only majority or minority single party governments. Spain's first coalition government did not occur until 2020, past the timeframe of this study (Field 2021, 544).

Table 4.18 – State Funding as a Percentage of PSOE and IU Party Income, 2001-2016

PSOE							
2001	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**
63.3%	62.1%	/	/	75.2%	73.2%	76.5%	68.9%
2009	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**
72%	76.3%	75.5%	65.6%	69.1%	77%	81.9%	78.2%
IU							
2001	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**
81.1%	81.4%	/	/	82.9%	64.4%	65.5%	78.6%
2009	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**
73.2%	65.7%	82.5%	87.4%	72.1%	79.1%	72.4%	69.9%

Like many new democracies, government funding of political parties has been an important element in the functioning of Spanish democracies. The "pacted break" that established Spanish democracy meant that there was a lack of political parties with long-standing connections with connections to civil society. In 1977, reimbursement for election expenses was implemented while the next year funding was expanded so that parties would receive funding based on the number of seats they won, as well as extra funding depending on the votes that they received in those districts (Casal Bértoa et al

2014, 96-97). By the start of our study period, the Spanish system of public party funding was composed of subsidies for three separate components, election expenses, parliamentary groups, and annual funding for "routine (i.e., non-electoral) activities" (van Biezen 2000, 330).

American military presence in Spain was solidified by the Madrid Pacts of 1953, which allowed America to station troops in the country in exchange for economic aid (Cooley and Hopkin 2010, 500). Further integration into the Western security alliance system followed liberalization. A 1986 referendum saw NATO membership approved by the public (Magone 2018, 286). NATO membership marked a period of increased 'Atlanticism' in Spanish foreign policy, with military integration with NATO being completed by the right-wing Aznar government in 1998 (Cooley and Hopkin 2010, 506). Spain joined the American invasion of Iraq in 2003, arousing the opposition of the Spanish public and direct participation in the war was reversed in 2004 with the election of the PSOE (Magone 2018, 288). Despite the withdrawal, the new government never requested the United States cease to use Spanish bases for the Iraq War (Cooley and Hopkin 2010, 495). Relations continued as normal despite chilled leaders relationships (Magone 2018, 288). When the PSOE were replaced by the PP under Mariano Rajoy, the new government began to emphasize the importance of European links. For example, the government released a new 'Strategy of Foreign Action' policy document in 2014 which tied Spanish foreign interests to European integration (Ibid, 288).

4.6.1 – Partido Socialista Obrero Español (PSOE)

The PSOE is one of the oldest social democratic parties in Europe and was a key player in Spain's transition to democracy. Founded in 1879, the party became a major

reformist party by the 1930s (Kennedy 2013, 15-20). The party was driven underground and was effectively refounded by local activists in 1974 after years of control from exiled party leaders (Ibid, 21). The party adopted mixture of social democracy and social liberalism in the late 70s (Ibid, 24, 26-27; Andrade 2012, 1). The party won the 1982 election in a majority and continued in government until 1996 (Magone 2018, 15-16). The party returned to power under Jose Luis Rodriguez Zapatero in 2004 and it strengthened its hold in the 2008 election. The financial crisis would lead to the party's ouster in favour of Rajoy's PP in 2011. In 2015 and 2016, both the PSOE and PP were severely hit by the rise of Ciudidanos and Podemos. The PSOE provided support for Rajoy's government in 2016.

Table 4.19 – PSOE Electoral and Government Strength

Electoral Strength						
Election Year	*1996*	*2000*	*2004*	*2008*	*2011*	*2015*
Vote Percentage	37.6%	34.2%	42.6%	43.9%	28.7%	22%
Government Strength						
Election Year	*1996*	*2000*	*2004*	*2008*	*2011*	*2015*
Overall Seat Percentage	40.3%	35.7%	46.9%	48.3%	31.4%	25.7%
Relevant Seat Percentage	0%	0%	93.2%	96%	0%	0%

The PSOE, like many Spanish parties, is highly centralized under the power of its Secretary-General. The method of selecting this leader has long been comparatively exclusive, relying on national party congresses (Barberà et al 2015, 59). While this will not affect our IPD rankings, as it took place past our cut-off date, following the resignation of General-Secretary Rubalcaba in 2014, the party used a closed primary vote among its members to select its new leader, Pedro Sanchez, before the national conference (Ibid, 64). Notably, this was done without amending the relevant party

statutes (Ibid, 66). Candidate selection in the party is comparatively decentralized for a Spanish party. Local party chapters can send suggested lists of candidates to provincial party chapters which then review the list and propose candidates which are sent to a regional commission which makes a final report to the national executive. This executive has final veto power over the candidates but generally acquiesces to the influential regional party bodies (Jaime-Castillo et al 2018, 234).

4.6.2 – Izquierda Unida (IU)

The history of IU begins with the Spanish Communist Party (PCE) (Fernandez 2002, 5). The PCE was formed in 1921 from pro-Bolshevik defectors from the PSOE (Kennedy 2013, 17). After becoming eclipsed by the PSOE following the re-establishment of democracy, the party founded IU in 1986 as an electoral alliance with the Republican Left Party and other parties (Magone 2018, 134-135; Verge 2010, 86-87). The party reached a high point in the 1990s, achieving impressive results under the leadership of the charismatic Julio Anguita (Ibid). Anguita had to resign due to illness in 1999 and was replaced with Francisco Frutos. Frutos was able to negotiate an electoral alliance with the PSOE for the 2000 elections, but a poor showing lead to his ouster as leader of IU (Ibid, 136). He was replaced by Gaspar Llamazares, the first leader of the IU to not be from the PCE faction of the party (Verge 2010, 91).[19] After the PSOE's victory in 2004, the IU's five members struck a deal to informally support the PSOE (Verge 2010, 92). The 2008 election was disastrous for the party, retaining only two members and losing its parliamentary group status (Chari 2008, 1073). Llamazares stepped down

[19] This caused some tension within the party, including in 2007, when the PCE attempted to use newly utilized party primaries to replace Llazamares with their own candidate, who was soundly rejected in the vote (Magone 2018, 136).

as leader and was replaced by Cayo Lara who took the party in a more radical anti-capitalist direction and refused to provide general support to the PSOE government (Verge 2010, 101-102). The party made gains in the 2011 election, taking advantage of the collapse of PSOE support (Ibid). However, the party suffered in 2015 due to competition from Podemos (Magone 2018, 137). For the 2016 election, IU would form a joint ticket with Podemos (Castillo-Manzano 2017, 159).

Table 4.20 – IU Electoral and Government Strength						
Electoral Strength						
Election Year	*1996*	*2000*	*2004*	*2008*	*2011*	*2015*
Vote Percentage	10.5%	5.5%	5%	3.8%	6.9%	3.7%
Government Strength						
Election Year	*1996*	*2000*	*2004*	*2008*	*2011*	*2015*
Overall Seat Percentage	6%	2.3%	1.4%	0.6%	3.1%	0.6%
Relevant Seat Percentage	0%	0%	2.8%	0	0%	0%

The party's method of selecting its leader is quite exclusive compared to most of our other cases. The party leader, known as the General Coordinator, is selected in a two step-process. First, delegates to the party congress, the *Asamblea Federal*, elect the *Consejo Político Federal*, the party's national council, who in turn appoint the General Coordinator and the party's board (Barberà et al 2014, 112). It should be noted that starting in 2016, Alberto Garzón became the first General Coordinator elected "by universal suffrage among the total militancy" (Izquierda Unida 2023). The *Consejo Político Federal* is central to the IU's process of candidate selection, having veto power over candidate lists from regional and national delegations and proving no pathway for input from local party branches (Cordero et al 2016, 857).

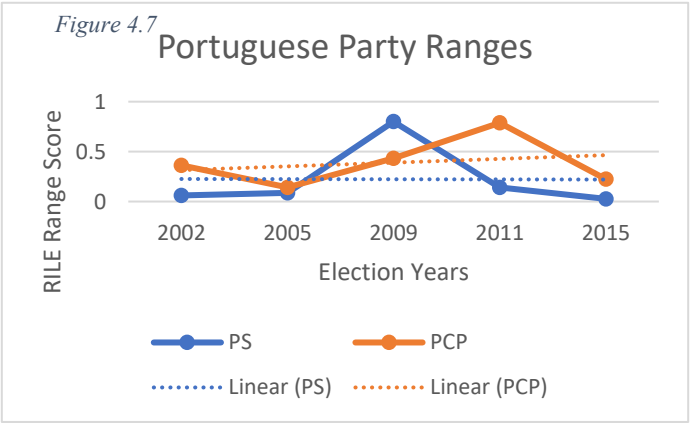
4.7 – Portugal

Portugal, like Spain, is another new democracy. Its democratic history begins with the Carnation Revolution of 1974, which saw the overthrow of Portugal's authoritarian right-wing Estado Novo government against the backdrop of anti-colonial independence military campaigns in Portugal's African colonies and a subsequent crisis of state (Costa Pinto and Paris 2023, 18-19). The importance of the legislative assembly is compounded by Portugal's use of a closed-list proportional representation (CLPR) voting system (Fernandes 2023, 181). Seat distribution is calculated using the D'Hondt method (Costa Pinto and Paris 2023, 23). Aside from our left-wing party cases, namely the Socialist Party (PS) and the Communist Party (PCP), the other two parties of the right are the Social Democratic Party (PPD-PSD) and the Centre-Democratic-Popular Party (CDS-PP). Of these two options for our comparison case, only the PSD has formed government, while the CDS-PP has been limited to being a coalition partner (Freire 2023, 88, 99).

4.21 – Portuguese RILE Range Scores

Year	PS	PCP	PSD	PS Range	PCP Range
2002	0.13	-0.292	0.069	0.061	0.361
2005	-0.238	-0.293	-0.151	0.087	0.142
2009	0.323	-0.045	-0.477	0.8	0.432
2011	-0.358	0.571	-0.217	0.141	0.788
2015	0.272	0.02	0.245	0.027	0.225

Figure 4.7



Portuguese subsidies are composed of subsidies for election expenses, parliamentary groups, and basic party expenses (van Biezen 2000, 330). Its development

is recognized to have gone through several stages; starting from the first financing laws in 1974 with no system of regulatory oversight, to the creation of the first system of regulated public financing in 1993 to the updating of regulatory and oversight mechanisms in 2003 (de Sousa 2014; 115). As part of these new regulations, a government entity known as the *Entidade das Contas e Financiamentos Políticos*, or ECFP, was founded in 2005 to track information from political parties (Ibid, 114). Our statistics on the state funding for our Portuguese cases comes from the EAPF and are therefore limited to numbers from 2004 onward.

Table 4.22 – State Funding as a Percentage of PS and PCP Party Income, 2000-2016

PS							
2001	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**
/	/	/	93.7%	72.9%	80.2%	76.2%	82.8%
2009	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**
86.7%	73.7%	73.4%	58.1%	65.3%	65.1%	62.5%	64.1%
PCP							
2001	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**
/	/	/	6.1%	31.4%	11%	10.5%	13%
2009	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**
35.9%	40.3%	11%	12.3%	12.2%	42%	19.3%	11%

Portugal's security and defense policies exist in tension between the country's nature as an Atlantic and European nation, as well as its relation to the Lusophone world in its former colonies (Robinson 2016, 135). Portugal was a founding member of NATO and the transition to democracy did nothing to damage and may have resulted in a strengthening of the relationship (Carreiras 2023, 766). Portuguese involvement with peacekeeping in Bosnia in 1996 is considered to mark the start of increasing EU, UN, and other multilateral engagement alongside its Atlanticist commitments (Ibid). While the country has increased its security cooperation with the EU, this process has been described as "limited" (Robinson 2016, 134). It initially resisted moves to establish the

European Defense Agency, tasked with implementing the CSDP, because doing so would "undermine the primacy of NATO", but has since participated in numerous NATO, EU, and UN missions (Ibid, 147).

4.7.1 – Partido Socialista (PS)

The Socialist Party was only founded in 1973, a year before the Carnation Revolution, in Germany by Mário Soares and 26 other clandestine Portuguese socialist organizers with the support of the SPD (Costa Pinto and Paris 2023, 22; Pratas and Bizzarro 2023, 354). Adopting Third-Way politics, Antonio Guterres led the party to victory in 1995. Guterres would continue as Prime Minister until PSD leader Durao Barroso became Prime Minister at the head of a PSD and CDS-PP coalition in 2002 (Freire and Costa Lobo 2002). Barroso headed the government for two years, before becoming the next President of the European Commission and was replaced as Prime Minister by the gaffe-prone Santana Lopez of the PSD (Freire and Costa Lobo 2006, 581). The PSD's government became increasingly unpopular. The PS was able to capitalize on the PSD's poor campaign to achieve the best result in its history, achieving an outright majority of seats and making its leader, José Sócrates, Prime Minister (Ibid, 586). While the party took a beating and lost its majority in the 2009 elections, it was

Table 4.23 – PS Electoral and Government Strength

Electoral Strength					
Election Year	*1999*	*2002*	*2005*	*2009*	*2011*
Vote Percentage	44.1%	40.2%	45%	36.6%	38.7%
Government Strength					
Election Year	*1999*	*2002*	*2005*	*2009*	*2011*
Overall Seat Percentage	50%	41.7%	52.6%	42.2%	47%
Relevant Seat Percentage	0%	0%	100%	83.6%	0%

able to form a minority a government (Castillo-Manzano 2017, 157). While the party lost the election in 2011 (Fernandes 2011), it was able to form government. Despite the party's second place finish, the Secretary General António Costa was able to form a coalition with both the PCP and the Left Bloc (Fernandes 2016, 896-898).

The party leader is known as the Secretary General and is the head of the national secretariat – the party's governing body (Lisi and Freire 2014, 125). However, in Portugal, unlike in Spain, parties have increasingly begun to adopt more inclusive methods of selecting their party leaders. PS first elected its Secretary General through a closed primary of party members in 1998 (Barberà et al 2015, 64). Candidate selection in PS resembles the process in the PSD. Both Portuguese parties start the process with their district or regional party branches, with local party organizations only being consulted, not providing an explicit list. PS has an explicit quota on the number of candidates decided by the party leadership. This quota was established in 2003, while regional input can also be stifled by the influence the party's campaign coordinator has in negotiations with regional party bodies (Lisi 2018, 213).

4.7.2 – Partido Comunista Português (PCP)

The oldest continuously existing Portuguese party, the Communist Party of Portugal has its roots in the 1920s but existed for most of its history as an outlawed clandestine organization but was legalized after the Revolution. Originally militant, a failed ultra-left-wing coup in November 1975 saw the party pull back its support from radical members of the military and consolidate its gains through electoralism, while committing to a dual strategy of electoral participation and revolution (Cunha 2008, 194-195; Costa Pinto and Paris 2023, 27). The PCP is "one of the most orthodox communist

parties in Western Europe" (Lisi 2015, 127). This reputation seems due to its history and its organization. Álvaro Cunhal was an orthodox Marxist-Leninist who first got involved with the party in the 1930s and served as Secretary-General from 1961 until 1992. (Cunha 2008, 207). He was replaced by Carlos Carvalhas, who replaced in turn by Jerónimo de Sousa in 2004 (Lisi 2015, 110). The party's highest achievements. The party vote stabilized in the three subsequent elections. Due to PS's result in the 2009 election, the PCP was able to informally support the government in parliament. The PCP's informal support was able to evolve into junior coalition partner status in 2015, after the PS returned to power following its defeat in 2011.

Table 4.24 – PCP Electoral and Government Strength					
Electoral Strength					
Election Year	*1999*	*2002*	*2005*	*2009*	*2011*
Vote Percentage	9%	6.9%	7.5%	7.9%	7.9%
Government Strength					
Election Year	*1999*	*2002*	*2005*	*2009*	*2011*
Overall Seat Percentage	7.4%	5.2%	6.1%	6.5%	7%
Relevant Seat Percentage	0	0%	0%	12.9%	0%

The PCP's leadership selection procedures resemble the more orthodox communist methods of the JCP. The party's leader is elected by a secretariat composed of members of the party central committee that is also elected by the central committee (Lisi 2015, 110). For candidate selection, while candidates are ratified by regional parties, the list of candidates itself is prepared by the Central Committee (Ibid, 102).

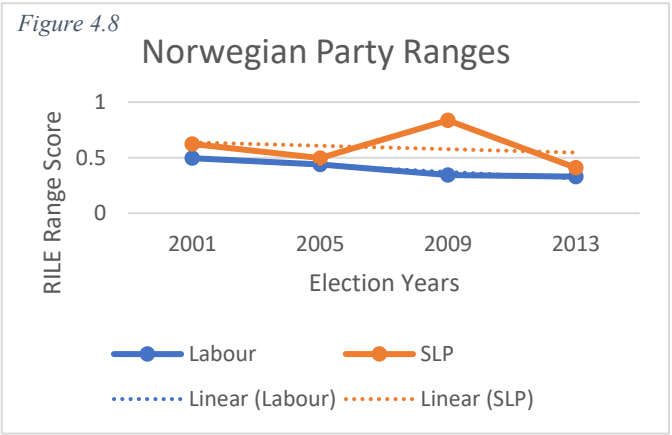
4.8 – Norway

Norway is the first of two Scandinavian case countries in our study. A constitutional monarchy, Norway is also a parliamentary democracy. Norway's unicameral parliament is called the Storting. Norway elects members to the Storting through a CLPR system. The Norwegian party system is displays certain continuities with the typical mid-20th century Scandinavian party system, along with certain changes since the 20th century. Scandinavian party systems have, since 1967, been conceived as being constituted by social cleavages along the lines of 'Rokkan's Triangle'; cleavages between owners and workers, centre and periphery and urban vs rural (Hansen and Kosiara-Pedersen 2018, 115). Several scholars have described the result of these cleavages as a 'five-party system' with a Labour/Social Democratic party and a smaller, radical party forming the left juxtaposed with three right-wing parties (Ibid, 116-117). Of these we will choose the Conservative Party. In 2005, the Conservative Party membership was roughly the same size as the Labour Party (Heidar 2005, 807). It also played a major role in government formation.

Table 4.25 – Norwegian RILE Range Score

Year	Lab	SLP	Con	Lab Range	SLP Range
2002	-0.762	-0.891	-0.267	0.495	0.624
2005	-0.802	-0.861	-0.364	0.438	0.497
2009	-0.132	-0.626	0.21	0.342	0.836
2013	-0.52	-0.6	-0.191	0.329	0.409

Figure 4.8



Norway introduced public financing for parties in the 1970s. Since 2005, party funding has been divided into a flat rate of "basic support" for all parties who have achieved 2.5% of the vote or have one MP, and then "vote support" that is proportional to votes received (Saglie and Sivesind 2018, 301-302). No party receives less than 50% of its budget from public funding, with most receiving much more (Heidar 2005, 814). Finding data for the Norwegian parties was comparatively easier than our other cases, as the relevant information is found on catalogued by Statistics Norway. However, the data only goes back to 2005, the year after these transparency measures were introduced into the Party Act, so we are missing some early data (Saglie and Sivesind 2018, 303).

Table 4.26 – State Funding as a Percentage of Norwegian Labour and SV Party Income, 2000-2016

Norwegian Labour Party							
2001	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**
/	/	/	/	63.5%	74.4%	70.9%	69.9%
2009	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**
69.5%	77.5%	61.9%	73.2%	71.5%	75.6%	60.2%	73.7%
SV							
2001	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**
/	/	/	/	78.5%	81.5%	74.3%	74.2%
2009	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**
70.3%	77%	68.3%	72.3%	60%	76.1%	70.1%	75.1%

Operating under CLPR, Norwegian parties are comparatively exclusive, and all share common characteristics (Fernandes 2023, 181). Party leadership candidates are screened by a national election committee, which then presents a single candidate to the party congress for ratification (Allern and Karlson 2014b, 50). In both the Labour Party and the Socialist Left Party, this committee is in turn nominated by the party's National Council (Ibid). Similarly, lists of party candidates prepared by the nomination committee

are officially elected by a regional delegate convention (Hazan and Rahat 2010, 74). The delegates vote on each proposed candidate individually and not in a bloc (Ibid, 84).

While a member of NATO, Norway is not a member of the European Union, albeit connected by a series of agreements (Rieker 2006, 151). Norway was a founding member of NATO in 1949 (Rieker 2006, 152). However, the country refused any permanent basing of either foreign troops or nuclear weapons, to balance its NATO commitments with reassuring the Soviet Union (Gebhard 2018, 262). Interestingly, compared to Sweden (see section 3.3.9) and the other Nordic countries, "Norway's post-Cold War defence and alliance policy has been most consistent with its pre-1989 position" (Ibid). Not being an EU member, Norway retained NATO as the cornerstone of its defense policies, but also reached out to the EU, including cooperation with the CFSP (Rieker 2006, 160). Norway also advocated a stronger NATO presence in the Arctic to counter Russian influence, in a manner that was often out-of-step with other NATO allies pre-Crimean crisis (Gebhard 2018, 262-263).

4.8.1 – Arbeidarpartiet

The Norwegian Labour Party was founded in 1887 and first gained parliamentary representation in 1903 (Information about The Norwegian Labour Party 2022). Originally a radical social democratic party, the party was briefly a member of the Communist International from 1921 until 1923. By the party's own account, it "abandoned its revolutionary profile and set a reformist course" in the 1930s (Information about The Norwegian Labour Party 2022). In the immediate post-war period, the Labour Party became the "hegemonic" party of Norwegian politics, although this position began to weak by the 1990s (Heidar 2005, 807). Although the party did not form government in

1997, the right-wing coalition lost control of parliament and Labour was able to form government with its leader Jens Stoltenberg as Prime Minister in 2000. However, it once again lost the 2001 election. This loss led the party to make election coalitions with both the SV and Centre parties, forming government in both the 2005 and 2009 elections.

Table 4.27 – Norwegian Labour Party Electoral and Government Strength				
Electoral Strength				
Election Year	*1997*	*2001*	*2005*	*2009*
Vote Percentage	35%	24.3%	32.7%	35.4%
Government Strength				
Election Year	*1997*	*2001*	*2005*	*2009*
Overall Seat Percentage	39.4%	26.1%	36.1%	37.9%
Relevant Seat Percentage	78.3%	0%	70.1%	74.4%

4.8.2 – Sosialistisk Venstreparti (SV)

The Socialist Left Party has effectively had two different births. In 1961, the party was originally founded as the Socialist Peoples Party by disaffected Labour Party members unhappy with Norway's membership in NATO and its nuclear policy. After joining with other left-wing forces as part of the opposition forces to Norway joining the EEC, and losing most of its communist members, the party adopted its current name in

Table 4.28 – SV Electoral and Government Strength				
Electoral Strength				
Election Year	*1997*	*2001*	*2005*	*2009*
Vote Percentage	6%	12.6%	8.8%	6.2%
Government Strength				
Election Year	*1997*	*2001*	*2005*	*2009*
Overall Seat Percentage	5.5%	14%	8.9%	6.5%
Relevant Seat Percentage	0%	0%	17.2%	12.8%

1975 (Olsen 2010, 16). During this period, the party initially saw some success, but then entered a period of decline until the 1990s (Stavenes and Strøm 2021, 487). The party attempted to become less divisive with the election of Kristin Halvorsen as leader in 1997 and made an impression showing in the 2001 election. As noted above, the party was able to form coalition governments with Labour in both 2005 and 2009. Halvorsen resigned as leader in 2011 and was replaced with Audun Lysbakken. However, the party only received 4.1% of the vote in 2013.

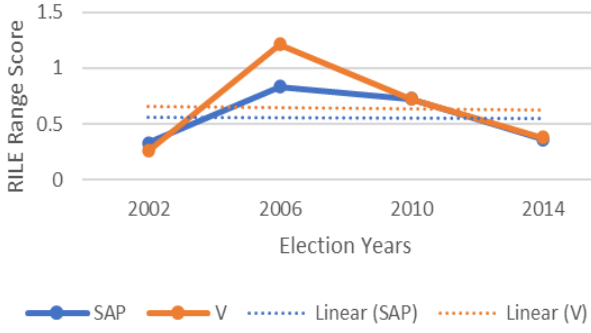
4.9 – Sweden

Sweden is the second Scandinavian nation on the list and shares certain similarities with Norway. It is also a constitutional monarchy and a unicameral parliamentary democracy. The unicameral parliament is called the Riksdag, which has had a seat count of 349 since 1971 (Persson 2018, 104). However, the four percent national threshold, and the use of the odd-number Saint-Laguë's method for calculating seat distribution, biases the proportionality of the system towards larger national parties (Hermansson 2016, 106). Sweden's party system resembles the ideal-typical 'Scandinavian party system'; a left centered around a Labour/Social

4.29 – Swedish RILE Range Scores

Year	SAP	V	Mod	SAP Range	V Range
2002	-0.997	-0.926	-0.667	0.33	0.259
2006	-0.619	-0.996	0.214	0.833	1.21
2010	-0.986	-0.987	-0.263	0.723	0.724
2014	-0.762	-0.778	-0.4	0.362	0.378

Figure 4.9 Swedish Party Ranges



Democratic Party with multiple smaller right-wing parties (Hansen and Kosiara-Pedersen 2018, 116-117). Despite right-wing governments being composed of multiple parties, we have decided to use the Moderate Party as our counterpoint for our comparisons. The Moderate Party most often supplies the Prime Minister in coalitions (Ibid). Furthermore, the Moderate Party is also the larger party. In a 2004 Swedish government report (Gidlund and Ström 2004), both Social Democrats and the Moderates were identified as the largest parties by party income (44).

State funding of political parties is a major source of revenue for Swedish parties (Koß 2010, 97). Direct public funding was introduced for parties represented in the Riksdag in 1965. This funding was eventually reformed and regulated under the 1972 Party Support Act (Gidlund and Ström 2004, 84). Public funding to political parties takes two broad forms: national funds distributed to all parties with at least 2.5% of the vote, and subsidies paid to help cover administrative expenses, in which a base amount of 5.8 million kroner is distributed equally to all parties, with bonuses going to opposition parties increasing with each seat they have in the Riksdag (Koß 2010, 96).

Table 4.30 – State Funding as a Percentage of SAP and V Party Income, 2001-2016

SAP							
2001	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**
34%	36%	/	/	/	/	/	/
2009	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**
33.8%	/	/	/	52.4%	57.8%	58.4%	60.4%
V							
2001	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**
87%	75%	/	/	/	/	/	/
2009	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**
/	/	94%	85.6%	/	80.4%	83.1%	85.8%

Despite the importance of public funding to Swedish parties, much like Ireland, Sweden was one of our cases for which publicly available data was sorely lacking. As

Koß (2011) notes, "[t]ransparency hardly exists in Swedish politics" (86). We do have data from both of our QCA time periods that will allow us to make at least a partially informed and defensible guess. Gidlund and Ström's (2004) report to the Swedish parliament has a breakdown of the percentage of public funding to all major political parties in 2001 and 2002, which we have used to get our earlier period information for the SAP and Left Party (44).

Swedish political party organizations have been noted to be comparatively static compared to other European nations, resisting the trend of increasing inclusivity (Aylott and Bolin 2021, 175). The *valberedning,* the nomination committee, is a unique element of Swedish parties. It is elected by the party congress and tasked with choosing one single candidate to put forward as party leader, a nomination that is generally accepted by the party congress (Ibid). The party congresses are in turn comprised of delegates selected by regional and municipal party organizations (Ibid, 178). This process is also used to nominate slates of candidates for Swedish elections (Bolin and Aylott 2021, 3).

Sweden has a long history of neutrality, officially codified as "non-alignment in peacetime and neutrality in war" by the Riksdag in 1949 (Gebhard 2018, 257). Despite this official stance, Sweden's actions have been more complicated. Swedish neutrality has been supported by a policy of maintaining credible military capacity. During the Cold War, while neutral, Sweden did share intelligence with the Western powers (Bjereld and Möller 2016, 437). Swedish policy in the post-Cold War era has become even more distant from its professed neutrality; it has even been dubbed 'postneutral' (Bjereld and Möller 2016, 433). As part of increasing engagement with Western security structures, Sweden has been a member of the PfP since 1994 and has partaken in NATO training and

international missions. Sweden's relationship with NATO has developed to such an extent that Sweden is referred to as either the "allied partner" or "partner number one" among staff at NATO's headquarters (Petersson 2018, 74).

4.9.1 – Sveriges socialdemokratiska arbetareparti (SAP)

The Social Democrats, or SAP, may well be one of the most successful parties within our case sample. From 1945 until 2014, the party formed government 66% of the time in Sweden and participated in every government from the years 1932 until 1976 (Bäck and Bergman 2016, 209-2011; Rothstein 1998, 3). For the purposes of our study, we are interested in the party's return to power in the 1994 elections under the leadership of Göran Persson. Despite a dent in party support following controversial pension reforms, the party was able to survive in both 1998 and 2002 with the support of both the Greens and V (the Left Party). (Aylott and Bolin 2007, 624; Loxbo 2011, 545). The party was defeated in the 2006 elections by Moderate leader Frederik Reinfeldt who built an electoral alliance with the Liberals, Christian Democrats and Conservatives (Aylott and Bolin 2007, 625, 627, 630). The Alliance formed a majority government for the first time in over twenty-five years, while Persson stepped down as leader after this defeat (Ibid, 621, 628). The party then failed to win the elections in 2010, going through before

Table 4.31 – SAP Electoral and Government Strength

Electoral Strength				
Election Year	*1998*	*2002*	*2006*	*2010*
Vote Percentage	36.4%	39.9%	35%	30.7%
Government Strength				
Election Year	*1998*	*2002*	*2006*	*2010*
Overall Seat Percentage	37.5%	41.3%	37.2%	32.1%
Relevant Seat Percentage	74.9%	82.3%	0%	0%

electing Stefan Löfven as leader in 2012, returning to government in 2014 (Aylott and Bolin 2015).

4.9.2 – Vänsterpartiet (V)

The Left Party was founded in 1917 as a radical, pro-Bolshevik, student and intellectual-led offshoot of the Social Democrats. The party has undergone multiple name changes since its founding adopting its current name in 1991 (Hult 2020, 235). Gudrun Schyman's election to party chair in 1993 saved the party from factional disintegration and begin the process of greater cooperation with the SAP (Ibid, 107). While cooperation continued after Schyman resigned in 2004, the party under her successor, Lars Ohly, embraced more elements of its Communist past (Ibid 115-116). The party's greatest success came in the 1998 elections (Ibid, 110), supporting the SAP in office, together with the Greens (Madeley 2003, 165-166). The Left Party and SAP failed to make ground against the Alliance in 2006 and 2010. This second loss marked the end of the left-wing blocs informal electoral alliance as neither SAP, V, or the Greens made any electoral alliances with each other for the 2014 parliamentary elections (Aylott and Bolin 2015, 731). Jonas Sjöstedt became leader in 2012 after Ohly resigned in 2011 (Sundelin 2012).

Table 4.32 – Left Party Electoral and Government Strength

Electoral Strength				
Election Year	*1998*	*2002*	*2006*	*2010*
Vote Percentage	12%	8.4%	5.9%	5.6%
Government Strength				
Election Year	*1998*	*2002*	*2006*	*2010*
Overall Seat Percentage	12.3%	8.6%	6.3%	5.4%
Relevant Seat Percentage	25.1%	17.1%	0%	0%

CHAPTER 5 – QCA

In this chapter, we will discuss and analyze the process and results of running our QCA analyzes with the data we have collected. In the previous chapters, we laid out the conceptualization and operationalization of our conditions, as well as the cases to which these conditions will be applied. The scores for each condition for each respective QCA have been complied into two graphs located in Appendix I. We begin this chapter with the process of constructing and testing fuzzy scores through trial and reflection to until we have our final set of scores. When we have these scores, we will move onto analyzing the results of our analyses and discussing the implications for our research and next steps for research.

5.1 – Constructing Fuzzy Set Scores

The first major step of our analysis is to convert our collected data into fuzzy set scores that are usable in QCA analysis. As discussed previously, fuzzy set scores are meant to show the degree of membership within a specific condition, or how much a case reflects the characteristics of the condition. While we have constructed various scores and quantifications to represent the concepts we are hoping to study, by themselves these scores are not useful to us. The first reason is technical. As can be seen in Appendix I, most of the scoring uses whole numbers rather than percentage points between zero and one. However, even in those cases in which our scores are already represented as such, they are still unusable as fuzzy set scores. This fact is because of our second, methodological reason.

Due to its case-based and Boolean foundations, QCA distinguishes itself from purely statistical understandings of how to deal with numerical variables. What this

means in practice is that we need to delineate three different points within the range of numbers we have calculated for each condition. These points are *e, c,* and *i* – the point of full exclusion, the crossover point, and the point of full inclusion (Dusa 2019, 81). Luckily for us, the QCA package for R studio allows us to easily calibrate our numbers with these points which will then convert them into fuzzy set scores.

As part of this section on calibrating the fuzzy set scores, we shall also describe the various configurations that we have tested to see which specific calibration will be the basis for our main analysis. To test these scores, it was necessary to construct truth tables for each of them. For the ease of understanding and space, we will only supply the e, c, and i points for each such test, including our final one, and then discuss the main issues or take aways from each of them. We will not show the truth tables or discuss them to the level that we shall do with our main test in the following section.

The first several attempts to run our QCA were unsuccessful as we were unable to find any configuration of conditions that passed the 0.8 inclusion threshold. Furthermore, almost all configurations that appeared with inclusion scores below the threshold had negation scores that were higher than their positive ones. The failed numbers (along with the successful attempt) can be seen in Appendix II. Cross referencing these failed calibrations with the range of scores in tables 4.1 and 4.2, these failures can be seen as the result of poor conceptual choices. As can be seen, for most of these calibrations, the exclusion and inclusion point are near zero and either 100 or 1, the numerical limits of our scales.[20] Instead, the exclusion and inclusion points should be set much closer to the

[20] While this makes sense for moderation, which needs an exclusion point of 0.001 to exclude all cases with a negative moderation score (which means they are polarizing rather than moderating), for the remaining conditions, this effectively makes most of the cases have fuzzy set scores huddling around the middle.

ranges exhibited by the cases. Furthermore, it is important to remember that our fuzzy set conditions do not refer to the mere presence of absence of a condition itself, which is why they best described using an adjective (Rubinson et al 2019). Therefore, we have occasionally set the inclusion and exclusion points to a number which puts some cases fully in or out of one condition, relative to our other cases. For example, Japan's security integration score would be calculated as a full one, as its score in both QCA sets is much higher than the other cases, and the case of Japan is effectively the ideal type for security integration in the asymmetrically independent sense in which we are exploring the concept.

5.2 [– Running the QCA

The time has finally come to run our QCA using RStudio. In this section, we will explain our process of running the tests. We will then examine the results of both QCAs by providing the truth table produced by RStudio, running a minimization of the successful configurations, and discussing the results, with reference to the negative scores where necessary. We will run each QCA twice, each time using our different IPD scoring systems (I1 or I2), totaling four QCAs in total. It should be noted that, as part of the calculation of our QCA configurations, we will include which cases are included under their respective configurations. The cases are represented numerically in the order in which they appear in tables 5.1 and 5.2. For the ease of comparison, we will also list the cases numerically in the footnote at the bottom of this page.[21]

[21] 1. NDP, 2. JCP, 3. UK Labour, 4. Irish Labour, 5. Sinn Fein, 6. SPD, 7. Die Linke, 8. PSOE, 9. IU, 10. PS, 11. PCP, 12. Norwegian Labour, 13. SV, 14. SAP, 15. V

After calibrating our ultimate calibration scores, we input the numbers into RStudio and calculated a truth table. Following the advice of Greckhamer et al (2018), we set the output score to 0.8, as anything below this benchmark lacks a sufficient consistency score (489). This means that the truth table would mark a configuration with a positive output if its inclusion score were above 0.8. Furthermore, any PRI scores should ideally be as close as possible to the inclusion score and above a 0.5 (Ibid). The resulting truth tables can be seen in figures 5.1 and 5.2. First let's examine the results using our I1 method of calculating IPD. As we can see, in figure 5.1, we had two configurations, comprising two cases, where we had a high enough inclusion score to mark the configurations as noteworthy. These cases are the JCP and the PSOE. However, it is important to check the scores for the negation, to see if they are higher than the positive. In this case none were.[22] Overall, six of our resultant configurations, regardless of noteworthy inclusion score, are associated with single cases. The four remaining configurations are associated with at least two cases, with one of the four having three cases. These pairs are the IU,

Figure 5.1 – QCA 1 (I1)

```
 OUT: output value
   n: number of cases in configuration
incl: sufficiency inclusion score
 PRI: proportional reduction in inconsistency

    C  I1 F  T  S    OUT    n  incl  PRI   cases
2   0  0  0  0  1     0     1  0.519 0.174 11
4   0  0  0  1  1     1     1  0.875 0.778 2
7   0  0  1  1  0     0     1  0.390 0.111 15
8   0  0  1  1  1     0     3  0.654 0.445 9,12,13
12  0  1  0  1  1     0     2  0.517 0.335 1,7
15  0  1  1  1  0     0     2  0.482 0.193 4,5
19  1  0  0  1  0     0     1  0.381 0.000 14
24  1  0  1  1  1     1     1  0.839 0.610 8
28  1  1  0  1  1     0     2  0.526 0.238 3,6
30  1  1  1  0  1     0     1  0.476 0.012 10
```

[22] The JCP has an inclusion and PRI score of 0.561 and 0.222, respectively. The PSOE has 0.737 and 0.390. For the JCP these scores are noticeably lower than the positive scores (seen in line 4 of figure 4.1) while the PSOE's positive scores are slightly above its negative scores (seen in line 8 of figure).

Norwegian Labour and SV, the NDP and Die Linke, Irish Labour and Sinn Fein, and the UK Labour and SPD. In these pairs, both Norwegian and Irish cases are linked together, while the governing UK Labour and SPD are also together.

Figure 5.2 – QCA 2 (I1)

```
OUT: output value
   n: number of cases in configuration
incl: sufficiency inclusion score
 PRI: proportional reduction in inconsistency

    C  I1 F  T  S   OUT   n  incl  PRI   cases
2   0  0  0  0  1    1    1  0.853 0.696 11
4   0  0  0  1  1    0    1  0.671 0.115 2
7   0  0  1  1  0    1    1  0.823 0.691 15
8   0  0  1  1  1    0    2  0.586 0.007 9,13
12  0  1  0  1  1    0    2  0.632 0.180 1,7
15  0  1  1  1  0    1    2  0.914 0.735 4,5
19  1  0  0  1  0    1    1  0.910 0.776 14
24  1  0  1  1  1    0    2  0.701 0.289 8,12
28  1  1  0  1  1    0    2  0.788 0.330 3,6
30  1  1  1  0  1    1    1  0.890 0.785 10
```

For the second QCA, we have a notable five configurations to explain the increased trend of foreign policy moderation from the years 2009 until 2016. We have our two separate configurations for both of our Portuguese cases and both of our Swedish cases. By contrast both Irish cases are placed within a single configuration. In terms of pairings of cases, we have five pairings of cases in total, all wit only two cases. The only country specific pairing is the Irish cases. While the SAP and Irish Labour Party scores are a little high, all negative scores are lower than their positive ones.[23]

Next, we can examine the results when we substitute our I1 measure for our I2 measure. In figure 5.3, our QCA for the period 2000-2008 using this measure, we see

[23] This is not the case if we look at the negative scores. The Irish Labour Party has a negative inclusion score of 0.851and a negative PRI score of 0.369. Sinn Fein has scores of 0.545/0.259 respectively. The PS has scores of 0.544/0.215, while the PCP has scores of 0.541/0.082. The Swedish Left Party has scores of 0.545 and 0.259, the same as Sinn Fein, since they are assigned together under the same configuration as line 7 in figure 4.2. Finally, the SAP has scores of 0.781 and 0.516.

some distinct differences between the results shown here and the results shown in figure 5.1. Here we have a single case configuration with a noteworthy inclusion score. This time only the PSOE appears as a significant case configuration.[24] Once again four configurations have more than one case although this time all multi-case configurations have two cases. This time we have two pairs of country specific cases being, once again, Ireland and Norway. The pairing of the UK Labour Party and the SPD is once again present. The final pairing is the JCP and the NDP which, while different, is also a pairing of the NDP with a more radical left party.

Figure 5.3 – QCA 1 (I2)

```
 OUT: output value
   n: number of cases in configuration
incl: sufficiency inclusion score
 PRI: proportional reduction in inconsistency

    C  I2 F  T  S    OUT    n  incl  PRI   cases
2   0  0  0  0  1     0     1  0.517 0.169 11
4   0  0  0  1  1     0     2  0.573 0.323 1,2
7   0  0  1  1  0     0     1  0.487 0.126 15
8   0  0  1  1  1     0     1  0.657 0.364 9
12  0  1  0  1  1     0     1  0.748 0.633 7
15  0  1  1  1  0     0     2  0.397 0.142 4,5
16  0  1  1  1  1     0     2  0.518 0.265 12,13
19  1  0  0  1  0     0     1  0.417 0.000 14
28  1  1  0  1  1     0     2  0.554 0.336 3,6
30  1  1  1  0  1     0     1  0.527 0.015 10
32  1  1  1  1  1     1     1  0.829 0.593 8
```

In the second QCA, we once again have five configurations that have registered a positive output value. Each configuration is associated with a single case, except for our Irish cases. We also see all parties from Portugal, along with Die Linke and the SAP.[25] Looking at all cases, we have four pairings of cases. These are the aforementioned Irish

[24] Checking its negative scores, the PSOE has an inclusion score of 0.751 and a PRI score of 0.407.
[25] The Irish Labour Party and Sinn Fein have negative inclusion scores of 0.623 and PRI scores of 0.125. The PS and PCP have inclusion and PRI scores of 0.604/0.215 and 0.563/0.082 respectively. The SAP has an inclusion score of 0.654 a PRI score of 0.345. All have lower negative scores than positive scores, some by a significant margin.

cases, the paring of the UK Labour Party and the SPD, the pairing of the PSOE and Norwegian Labour Party, and finally the pairing of the NDP and JCP, which is a repeat pairing from our I1 second QCA.

Figure 5.4 – QCA 2 (I2)

```
OUT: output value
   n: number of cases in configuration
incl: sufficiency inclusion score
 PRI: proportional reduction in inconsistency

    C  I2 F  T  S    OUT    n  incl  PRI   cases
2   0  0  0  0  1     1     1  0.855 0.696 11
4   0  0  0  1  1     0     2  0.495 0.000 1,2
7   0  0  1  1  0     0     1  0.785 0.580 15
8   0  0  1  1  1     0     1  0.590 0.008 9
12  0  1  0  1  1     1     1  0.820 0.456 7
15  0  1  1  1  0     1     2  0.893 0.784 4,5
16  0  1  1  1  1     0     1  0.772 0.017 13
19  1  0  0  1  0     1     1  0.921 0.776 14
28  1  1  0  1  1     0     2  0.778 0.369 3,6
30  1  1  1  0  1     1     1  0.879 0.735 10
32  1  1  1  1  1     0     2  0.717 0.287 8,12
```

Using the results of our truth tables, we have also calculated the Quine-McClusky minimizations of our results. Such minimization is the "core of the QCA methodology" as it allows us to express the results of the analysis in the most parsimonious manner (Dusa 2019, 159). In these minimizations, the absence of a configuration is marked with a tilde. If there are several possible combinations of effects, they are separated by a plus sign (Ibid, 152, 191). We calculated the minimizations for both our set time periods twice, each time using a different formula for measuring IPD (I). Subsequently we have four different minimization formulas. They are as follows.

Using our I1 formula for IPD, for the first QCA we found two separate configurations: **C*~I1*F*T*S + ~C*~I1*~F*T*S**.[26] For the second QCA, we have four separate configurations: **C*I1*F*~T*S + ~C*~I1*~F*~T*S + ~C*F*T*~S +**

[26] These are interpreted as the presence of political party strength, public funding, and high levels of both transnationalization and security integration or the presence of high levels of transnationalization and security integration, but the absence of political party strength, IPD and public funding.

C*~I1*~F*T*~S.[27] Now turning to our I2 formula for calculating IPD, we can see some noticeable differences. The first QCA is like the results of our alternative analysis, returning two separate minimizations: **C*I2*F*T*S + ~C*I2*~F*T*S**.[28] However, the resulting minimizations of our second QCA using this IPD formula are quite distinct. In this case, we returned *five* different noteworthy configurations: **~C*~I2*~F*~T*S + C*~I2*F*T*~S + ~C*I2*~F*T*S + C*I2*F*~T*S + ~C*I2*F*T*~S**.[29]

For the ease of clarity, we have followed the advice of Verweij and Vis (2021) and created two tables tracking the minimizations of our QCA results over the different time periods for which we have run an analysis. a filled shape represents the presence of the configuration while an empty shape represents its absence (Ibid, 104-105).

Table 5.1 – Minimization of QCA Results (Using IPD1 and IPD2 models)

	C	I1	F	T	S
2000-2008	● / △	○ / △	● / △	● / ▲	● / ▲
2009-2016	● / △ / ☆ ✚	● / △ / ✚	● / △ / ★ ✚	○ / △ / ★ ✚	● / ▲ / ☆ ✚
	C	**I2**	**F**	**T**	**S**
2000-2008	● / △	● / ▲	● / △	● / ▲	● / ▲
2009-2016	○ / ▲ / ☆ ✚ / □	○ / △ / ★ ✚ / ■	○ / ▲ / ☆ ✚ / ■	○ / ▲ / ★ ✚ / ■	● / △ / ★ ✚ / □

[27] The first configuration is marked by the presence of all our configurations except high levels of transnationalization, while the second is marked by the absence of all our configurations except for security integration. The third configuration features the absence of security integration and party strength, but the presence of high levels of public financing and transnationalization. The final configuration is characterized by the presence of party strength and transnationalization but the absence of security integration, IPD, and public funding.

[28] The first of these configurations is noted to have all of our different conditions present, while the second minimization is characterized by the absence of both strong political parties and high public funding.

[29] The first only returned the presence of security integration and the absence of the remaining conditions. The second configuration is marked by the presence of party strength, high levels of public funding, and transnationalization with the absence of high levels of security integration and intraparty democracy. The third configuration is marked by high levels of bot international conditions, but the absence of all domestic conditions except for high levels of IPD. The fourth configuration has a similar pattern but with an absence of transnationalization rather than security integration. The final configuration is marked by the presence of high levels of IPD, along with high levels of public funding and transnationalization, but the absence of a strong and competitive party position and high levels of security integration.

5.3 – Analysis

The results of our QCA does not give us any consistent pattern of conditions associated with moderation of foreign policy positions. However, in telling us nothing consistent, our results do shed light on our theoretical perspectives and do suggest future avenues for research in the patterns that do emerge. We have examined the presence and absence of configurations in our successful configurations and created a table (5.1) identifying how consistently a specific condition appears in our configurations. As we can see, the two conditions that represent our international factors, transnationalization and security integration, are more common in our successful configurations compared to our domestic conditions. They both appear in our configurations with the same frequency, and no configuration out of the twelve generated by our research has no international conditions associated with them. Domestic conditions are evenly split between being present or absent. The only domestic condition below fifty percent is IPD, which does rise to over fifty percent if we only consider our I2 approximation of IPD.

Table 5.2 – Percentages of Present Causal Conditions in Successful QCA Configurations

Time Periods	**C**	**I1/I2**	**F**	**T**	**S**
All Time Periods	46.2%	46.2% (20%/71%)	53.8%	69.2%	69.2%
2000-2008	50%	50% (0%/100%)	50%	100%	100%
2009-2016	44.4%	44.4% (33.4%/60%)	55.6%	55.6%	55.6%

This pattern, or lack thereof, is devasting for our main supposition that we would find a consistent pattern, incorporating both domestic and international conditions, associated with an increase in moderation along the lines that we theorized. What this

suggests is that rather than conceiving overarching structure which we try to identify, a more profitable step would be to select specific cases and examine them both in relation to our identified conditions and any other possible mechanisms. For example, one could examine the Left Party from 2008 to 2016. During this time, in our manifesto data, we can see a decrease in moderation in 2010 but an increase in 2014. Between this time, there was leadership change between the more radical Lars Ohly to the comparative moderate Jonas Sjöstedt. Finally, the party had rejected a pre-electoral coalition alliance with the SAP for the 2014 election, unlike for the 2010 election. The fact that the party become more moderate despite the lack of a coalition agreement complicates the assumption that such moderation would be the result of coalitional and pure domestic electoral logics. Now, due to the specificity with which we selected our conditions, it is perhaps possible that some structure is out there that future research hints at. However, in light of the multifaceted situation implied by our QCA results, we would suggest that hypothesizing structures out of cases would be a more efficient process.

Not only did we not return any consistent pattern, but many of our cases were also returned with distinct configurations, successful or otherwise. Many cases had a unique combination of conditions that were associated with moderation. We can elaborate on this point by examining the situations where cases were paired under a successful configuration. When we have pairings, pairings between cases in the same country are a significant proportion of these pairings. This suggests that historical institutionalism, which attempts to examine political phenomenon through the particularities of institutional change, critical junctures, and the momentum of past decisions, may be a

more useful theoretical perspective to use for this research (Halperin and Heath 2020, 266).

Table 5.3 – Pairings of Cases in Our QCA Results				
	Country Pairing	**Mixed Pairing (Not Country)**	**Radical Pairing**	**Moderate Pairing**
Total	6	5	2	6
Percentage (out of 19)	31.6%	26.5%	10.5%	31.6%

Despite our lack of consistent presence of any one international conditions, these conditions did appear more frequently than our domestic ones. Furthermore, while we occasionally saw combinations with no domestic conditions, we never encountered one with no international conditions. This could be a result of the sheer prevalence of cases exhibiting these conditions or could be a hint at some influence these conditions have on the domestic sphere, or even both possibilities simultaneously. Although unreflected in our current numbers, in a prior QCA, in which we used a modified version of the complete indices developed by von dem Berge and Poguntke to measure IPD, instead of our modification of only using leadership and candidate selection scores, the results were effectively the same, except security integration rose to 90% presence in all our successful configurations.

This would suggest that security integration could be a necessary component of foreign policy moderation. However, keeping our current results in mind, and looking at our cases listed in figures 5.1-5.4, the fact of moderation among our Irish and Swedish parties, famous as European neutrals, means that security integration by itself cannot be a necessary condition. We are left in a position where the international conditions appear to be important, but merely sufficient conditions for moderation, with no mechanism in sight. In this respect, rather than focusing on the international sphere as a set of structures

which impact and constrain domestic possibilities, they are instead exogenous contours impacting the domestic environment around which agents make decisions and operate.

Our findings thoroughly challenge our cartel party thesis assumptions. Public funding was present in our configurations around fifty percent of the time whether being viewed from a specific time period or being viewed holistically. Within the cartel party thesis, increased public funding is a key factor that delinks the party from a class of private citizen donors, and encourages it to moderate and collude with the state. From this perspective, if the cartel thesis is providing a key explanatory mechanism, we should expect it to appear with consistent frequency. The fact that is does not do so supports the conclusion of studies which have cast doubt on the thesis on the basis of public funding, and have challenged its coherence and holism, as well (Detterbeck 2008; Jansen and Young 2011).

The one exception to this trend of fifty percent appearance in our complete minimized solutions is our IPD scores, which appear around forty percent of the time. Interestingly, our IPD scores do rise above 50% if we accept the I2 conceptualization of intra-party democracy. We must remind ourselves that according to the I2 standard, the presence of IPD indicates strong local/regional party power in selecting leaders and candidates, rather than members or party elites. If this is the case, then this suggests that moderation can occur through the influence of local party leaders and activists, contrasting with the expectations of Katz and Mair (1995; 2018) regarding the increasing influence of leaders going together with depoliticization and moderation. It also acts to support Loxbo's (2011) case study of the SAP in both the 1950s and the 1990s suggesting that party activists were stronger in the 90s than in the 50s, contradicting the

common view that party leadership becoming stronger at the expense of party activists spurs moderation. One potential explanation of this is that such party activists/delegates are more likely to accept office-seeking behaviour for in exchange for policy influence (Strom 1990, 575-576), contrary to Katz and Mair's expectations.

More surprising is the lack of consistent presence of party strength, or lack thereof. As previously discussed, we included party strength as a measure of the influence of domestic electoral systems and with the expectation that it could consistently be associated with moderation. Looking at our successful configurations, party strength only appears in a successful configuration with the PSOE in figure 5.1, the PS and SAP in figure 5.2, the PSOE in figure 5.3, and the PSOE and SAP again in figure 5.4. However, if one looks at unsuccessful configurations, all configurations in figures 5.1 – 5.4 indicating the presence of party strength all include social democratic parties; no smaller parties of the radical left had party strength associated with moderation. Of course, this could be a side effect of our calibration of the measure of party strength.

To examine this possibility further, tested only our fringe or radical parties. All our calibrations were calibrated the same as our fourth attempt in Appendix II, with two exceptions. Party strength was calibrated with 1, 5, and 10 as the e, c, and i points respectively, while both IPD scores were calibrated to 0.15, 0.25, and 0.5. Using our I1 calibrations, we returned no successful configurations with party strength in either period. The first QCA returned configurations for both the JCP and Die Linke.[30] The second QCA returned identical configurations for the JCP and Die Linke again, with the addition

[30] Both configurations included both international conditions (T and S), while Die Linke noted the presence of IPD.

of the IU.[31] Using our I2 calibrations, we did return some configurations with party strength, but only in the period from 2009-2016. In our first QCA using this method, we returned three successful configurations involving the JCP, Die Linke, and IU respectively.[32] In the second period, we returned four configurations altogether, three involving party strength. However, the configuration including Norway's SV Party had higher negative score than positive score, leaving us with only two successful configurations involving party strength, the PCP and Die Linke.[33]

Returning to our data in table 5.3, we can elaborate on more patterns that emerge and their implications. Both in our overall QCAs and radical party specific QCAs, most radical parties exhibit more unique conditional configurations, while the more moderate, social democratic parties on our list tend to be paired more often. This suggests that moderate social democratic parties are more likely to share certain common conditions that promote moderation; likely the need to defend a governing record. However, radical parties, as per their more marginal place in the electoral sphere, face many different conditions which can affect their choices. This further points to the need to focus attention on case studies to see what distinctions can be made.

[31] The IU's configuration included both international conditions as well as public funding.
[32] All involved both international conditions, with Die Linke adding IPD, and the IU adding public funding
[33] Both also included security integration along with party strength, although these were the only present conditions for the PCP. Die Linke's configuration included all points except public funding.

CHAPTER 6 – Conclusion and Reflections

Having completed our QCA, we can now conclude our study with several recaps and reflections. While disappointed that our theoretical viewpoint has not born fruit, we are excited that we have been able to gather some new and useful data and gain enough understanding to make some key theoretical judgements. In this chapter we will reflect on the key phenomena under consideration, moderation, and what our study has said about it. Following that we will recap and reflect on the design limitations of our study and what theoretical and design lessons we can take from it. This will lay out pathways for the next steps in our research project.

6.1 – The Reality of Moderation

Our study depends on the existence of moderation in foreign policy. While our investigations into theoretical and explanatory conditions have supplied us with more negative answers than positive answer, we have been able to establish a general but not universal trend towards moderation. If we examine our cases over both time periods, from 2000 until 2016, we can see that we have five cases of parties becoming more polarized and ten cases of parties becoming more moderate. Rather than a consistent trend across our Global North countries, moderation differs from country to country.

However, these results become more interesting when we divide them between our two QCA time periods, as can be seen in the QCA scores contained in Appendix II. If we do this and look at the time period between 2000 and 2008, we have eight parties[34], a slight majority of cases, that became more polarized, compared to seven which

[34] These polarizing cases are the NDP, UK Labour Party, Sinn Fein, PS, PCP, SV, SAP and V parties.

moderated.[35] By contrast, if we look at our cases between 2009 and 2016, only two cases experienced polarization[36] while the remaining thirteen moderated. This fact itself is an interesting data point. Focusing on the time periods themselves, one stark dividing line stands out; our first time period was dominated by both the broader War on Terror and the Iraq War, while our second period featured the aftermath of the 2008 financial crisis and the migrant crisis.

Looking at our first period polarizing cases, the presence of the NDP and UK Labour party, along with the Portuguese parties and the Swedish Left Party, may suggest that active participation in combat missions, such as missions in Afghanistan or Iraq, act to polarize the party system. To some extent that is undoubtedly true. However, the fact that the Swedish parties and Sinn Fein, representatives of our neutral nations, are included as well raises questions about security integration's causal role. Rather than a causal condition, security integration, whether as a completed or potential process, could be an arena for norm contestation than a mechanism in and of itself.

While our research may show widespread, if not universal trends of moderation, particularly in the period since 2008, this depends on the reliability of our operationalization. One potential criticism is that, with radical parties, their strong left-wing scores means that our system is too sensitive to shifts among right-wing parties. This is a concern in some cases but can be allayed when we study our cases more deeply and individually, which alsos nuance our understanding of the nature of moderation.

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[35] These moderating cases are the JCP, Irish Labour Party, SPD, Die Linke, PSOE, IU, and Norwegian Labour parties.
[36] These cases are our Spanish parties.

This is the case for the JCP, where our recognition of them as having moderated is born out in the literature. In 2000, the JCP revised its party statutes and began adopting moderating its socialist language (Day 2010, 546). This has resulted in a noticeable moderation of the party's political positions. In June 2003, the party announced its acceptance of Japan's imperial system and later announced their support for female succession to throne (Berton and Atherton 2018, 44-45). Notably, for our purposes, the party also "froze" its demand to scrap the US-Japan security treaty to become more acceptable to potential coalition partners. In 2004, the party also dropped its demand for an immediate abolishment of the JSDF, postponing it to a future opportune time based in national consensus (Day 2010, 555). However, the party does remain committed to an overall vision of socialist pacificism. The party is strongly against US bases in Japan and is particularly successful electorally in Okinawa as a result (Berton and Atherton 2018, 45-46). Protecting Article 9 of the Constitution is also a strongly held position (McElwain and Winkler 2015, 267). We can see distinct shifts but within a left-wing frame.

Another example would be the Swedish Left Party. As per our research, the party's foreign policy positions became more polarized during the War on Terror period but began to moderate during the 2009 to 2016. As we also mentioned in the last chapter, the party's lack of active electoral engagement with the SAP and leadership change makes it a good case study that avoids. As part of this preliminary research, we did collect some textual data from Riksdag debates between 2009 and 2015, specifically taking all debates labelled as foreign policy that took place during that time frame. Analyzing this data, although there were no major shifts around questions such as NATO, we can see hints of a discursive shift in which socialist language and phrasings were

scaled back and more multilateralist framings take precedent.

Table 6.1 – Thematic Coverage in Left Party Foreign Policy Riksdag Speeches, 2009-2015

	2009/10	**2010/11**	**2011/12**	**2012/13**	**2013/14**	**2014/15**
Bourgeois	11 0.14%	3 0.05%	9 0.22%	10 0.16%	8 0.08%	1 0.01%
Solidarity	18 0.26%	0 0%	4 0.11%	1 0.02%	10 0.11%	3 0.04%
International Law	16 0.22%	2 0.05%	6 0.14%	3 0.05%	17 0.15%	37 0.44%

6.2 – Design Limitations, Implications, and Avenues of Future Research

As we have touched on in throughout our study, there are inherent limitations to the methodology we have chosen. While we have attempted to analyze the results as we have gathered them, we need to recognize several caveats in the information we have gathered, and how those caveats can help us to design the most efficient and effective ways of utilizing our data.

Once again, one weakness of QCA in general is its limited ability to capture change over time. To make the method generalizable, we have had to fit our cases within comparable blocks of time and construct calibrations that best represent how much they represent membership in certain categories, *relative to the other cases*, within that time frame. A look at any of our moderation graphs will show fluctuations within our general trends. In the PPDB survey results, the PSOE in Spain record different answers in several sections between the years 2012 and 2014, suggesting that there were reforms in between that period. Specifically, this was the adoption of a closed party primary for the 2014 leadership election (Barberà et al 2015, 59). These nuances have necessarily been flattened to fit the methodology. Therefore, although QCA allows us to be case specific, this specificity can only go so far before being sacrificed on the altar of generalizability.

The results of our research, both the concrete results and the limitation driven ambiguities lead us towards certain new areas. As mentioned in the previous chapter, engaging in exploratory case studies to identify possible mechanisms. We have already discussed the potential of examining the Swedish Left Party, both in general terms and in terms. It is also important to test case studies that go against our expectations. Notable examples would be our Spanish cases, particularly in the 2009-2016 period. As noted above, they are our only polarizing cases during this period. Examining these cases, especially in relation with other positive cases can help us establish which conditions are necessary or sufficient. Furthermore, if we examine our range scores, both our Spanish case parties and our comparison party, shift to the right during this time period. Therefore, there may be case for our Spanish scores to be a false negative case of moderation. As this case, and our other cases mentioned in section 6.1 show, the phenomenon of moderation itself could be further expanded upon theoretically. Due to the quantitative nature of our CMP derived measure, and the necessity of creating a unidimensional scale, there is a possibility that moderation could be happening in one regard but not the latter (i.e., a party increasingly promoting multilateral engagement but maintaining a need for armed neutrality). Approaching the manifestos from a discursive and time-sensitive angle could illuminate not only whether moderation is happening, but on what topics convergence is happening. This could in turn help us narrow in on potential conditions and mechanisms influencing moderation.

Finally, our Marxist inspired categorical conditions have not brought us any definite clarity to the questions we have sought to answer. Although it appears that international conditions, particularly around security are important, we have not made

any productive step to see how this impacts decisions to moderate. The failure of our structural approach, as well as the fact that there are clear domestic variables does suggest that we should not attempt to conceive of 'the international' as a structure, at least in regard to domestic and international interactions. As a result, we could adopt alternative Marxist modes of analysis that can accommodate this caveat, such as Gramscian approaches (Joseph 2008, Pasha 2008) or insights from Jessop's strategic relational analysis (SRA) (Jessop 2016). Alternatively, we could abandon the Marxist project altogether. Our preliminary work on the Left Party in Sweden, and our desire to examine moderation for contextually suggest that, regardless of which choice is made, ensuring that an alternative theory and methodology adopts measures from constructivism would be the best strategy to ensure a more contextual understanding of moderation.

6.3 – Conclusion

We began our project with a normative appreciation for a range of democratic choice in policy positions among political parties. This led us to conceive of a research design inspired by, and designed to test, both Marxist, particularly TCC, and cartel party thesis suggests about forces which encourage moderation in policy. We also brought along some theoretical assumptions that guided our framing and design of our study that we hoped could shed some light on the phenomenon in question. In the process of researching our question were able to identify general, yet not universal trends towards foreign policy moderation, particularly in the aftermath of the financial crisis. We were also able to fill in the notable gaps in longitudinal public funding information by sorting

through official party documents archived by governments, which hopefully will be of use to researchers in the future. These are concrete tools available to other scholars.

When it comes to our hypothesis and research questions, we have also collected many answers. Unfortunately, most of them are of a negative variety. While moderation does exist, rather than a set configuration of conditions, there are a multiplicity. As a test of our theoretical perspectives, our study has shown us it is far more profitable to focus more on contextuality, agency, time-sensitive details, and are less paradigmatic. Our research also casts doubt on the validity of the cartel party thesis has an explanatory theory of party change, rather than a semi-prevalent ideal party type. However, by redirecting us, we are in a position in which to continue our research, having learned which methods are, and narrowing us in on specific case studies that can shed more light on our research.

APPENDIX I –Raw Scores for QCA Analysis

Party	M	S	I1	I2	F	T	S
NDP	-0.01	6.91	0.83	0.35	37	60.24	67.6
JCP	0.39	4.31	0.10	0.10	0	35.17	76.9
UKLAB	-0.12	71.47	0.70	0.73	1.5	52.32	64.9
IRELAB	0.29	6.93	0.88	0.63	82.2	80.05	20.8
SF	-0.21	1.37	0.45	0.68	77.9	80.05	20.8
SPD	0.41	57.50	0.30	0.58	28.66	49.84	66.1
DL	0.61	2.73	0.30	0.58	36.95	49.84	66.1
PSOE	0.36	36.16	0.38	0.63	69.87	39.09	61.2
IU	0.36	3.45	0.18	0.18	75.64	39.09	61.2
PS	-12.11	26.40	0.68	0.45	81.16	14.44	62.8
PCP	-0.2	4.28	0.10	0.10	14.37	14.44	62.8
NORLAB	0.31	34.38	0.33	0.55	69.68	47.16	61.9
SV	-0.34	5.72	0.33	0.55	77.13	47.16	61.9
SAP	-1.19	54.71	0.20	0.40	35	58.55	23.8
V	-1.8	14.64	0.20	0.40	81	58.55	23.8

Party	M	S	I1	I2	F	T	S
NDP	0.07	12.14	1.00	0.25	43.27	64.25	67.6
JCP	0.12	2.64	0.10	0.10	0	39.89	78.3
UKLAB	0.2	43.84	0.88	0.63	14.9	57.06	64.4
IRELAB	0.3	16.43	0.88	0.63	89.8	67.03	39.1
SF	0.35	3.47	0.45	0.68	85.38	67.03	39.1
SPD	0.28	27.06	0.30	0.58	28.77	57.8	64
DL	0.29	6.18	0.30	0.58	39.93	57.8	64
PSOE	-0.19	32.80	0.38	0.63	74.45	47.54	60.5
IU	-0.63	1.87	0.18	0.18	75.29	47.54	60.5
PS	0.95	50.69	0.68	0.45	68.6	15.55	63
PCP	0.48	6.01	0.13	0.10	22.99	15.55	63
NORLAB	0.25	50.22	0.33	0.55	70.39	40.05	61.3
SV	0.18	10.56	0.33	0.55	71.15	40.05	61.3
SAP	0.57	20.25	0.20	0.40	52.57	63.37	41.2
V	0.69	3.48	0.20	0.40	85.78	63.37	41.2

APPENDIX II - Constructing Variable Scores and Calibrations

Unique scores for leadership selection were assigned to all our Scandinavian parties in both periods, all explicitly communist parties in both periods (the PCP, JCP, and IU), and the UK Labour Party and the NDP in our first QCA period. Each party has two different scores, one each for the I1 and I2 measures. They will be given in that order. The Labour and NDP parties were given a leadership score of 0.65 and 0.45 to reflect their unique usages of delegated conventions utilizing a mix of OMOV and bloc voting for interested affiliates such as labour unions. All Scandinavian parties were given a score of 0.20 and 0.4 to represent the use of consensus-based nomination committees. Both the JCP and PCP were given score of 0.10, in both measures, to reflect the exclusivity of the concentration of power within the party's central committee, which while technically not the domain of a single leader, comes as close as possible to one among our cases.

For candidate selection, unique scores were once again assigned to the Scandinavian and communist parties, along with the German parties, the PS and Sinn Fein. The scores given to our Scandinavian parties differ by country in a way they did not for leadership scores. The two Norwegian parties were given scores of 0.45 and 0.70, while the Swedish parties were given scores of 0.20 and 0.40. This is because while both use nomination committees, in Norway, proposed candidates are individually selected by regional delegates, giving membership more final say. The JCP and PCP received the same score, 0.10, as they did for leadership selection and for the same reasons. However, the IU received a score of 0.20. Sinn Fein received a score of 0.65 and 0.85. While local branches are often given free reign to choose candidates in practice, the *Ard Comhairle*'s

extensive power to meddle enjoins us to give the party a slightly more exclusive score. Both German parties received scores of 0.35 and 0.65 to act as a midway point between the local and regional party scores, as candidates are selected at both levels, depending on whether they are *Erststimme* or *Zweitstimme* respectively. Finally, PS also received scores of 0.35 and 0.65.

QCA Calibrations			
1st Attempt	**e**	**c**	**i**
Moderation	0.001	0.4	0.95
Party Strength	4	35	75
IPD	0.4	0.55	0.9
Public Funding	20	60	90
Transnationalization	30	50	90
Security Integration	40	60	90
2nd Attempt	**e**	**c**	**i**
Moderation	0.001	0.2	0.7
Party Strength	0.001	15	72
IPD	0.2	0.5	0.9
Public Funding	0.001	35	90
Transnationalization	10	40	82
Security Integration	20	50	90
3rd Attempt	**e**	**c**	**i**
Moderation	0.001	0.2	0.7
Party Strength	0.001	5	75
IPD	0.35	0.55	0.8
Public Funding	10	45	85
Transnationalization	10	45	82
Security Integration	20	60	90
4th & Final Attempt	**e**	**c**	**i**
Moderation	0.001	0.2	0.7
Party Strength	3	20	40
IPD	0.15	0.43	0.8
Public Funding	10	60	80
Transnationalization	10	30	60
Security Integration	40	60	70

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