Militarism – understood as the social and international relations of the preparation for, and conduct of, organized political violence – is an abiding and defining characteristic of world politics. Recent and ongoing wars in Sri Lanka, Rwanda, Afghanistan, Pakistan, Iraq, Somalia, Syria, Libya and Sudan, plus at least 30 lesser armed conflicts (Themnér and Wallensteen, 2011), and rising global military expenditures since 2001 (Perlo-Freeman et al., 2010), are but the most conspicuous contemporary indications of this. Successful military coups in Fiji and Thailand (both 2006), Mauritania and Guinea (2008), Madagascar and Honduras (2009), and Niger (2010), and the entrenched power of Middle Eastern military actors, even in the face of the Arab Spring protests (2011), all speak to the enduring power of military actors within political, economic and social life. In a very different but far from unrelated way, the recent record of the British state in supporting its domestic arms industry through a range of morally and legally questionable means – from facilitating the early release of Abdelbaset Megrahi from Scottish jail in order to promote arms (and oil) interests in Libya, to unlawfully quashing investigation of corrupt activity by BAE Systems, to collaborating with defence contractors to systematically under-budget military capital projects (Quinn, 2010; Peel et al., 2008; Haynes and Coghlan, 2010) – clearly suggests that militarism is characteristic of global North and global South alike.

Yet despite the ongoing social, political and economic reach of military institutions, practices and values, the concept and subject of militarism have not received significant attention within recent debates in International Relations (IR). A great deal of scholarly work was produced during especially the late Cold War era on arms races, military expenditure, arms sales to the Third World, the vast numbers of people under arms, and those militaristic attitudes, structures and practices that produce, or are shaped by, modern warfare (e.g. Albrecht et al., 1975; Eide and Thee, 1980; Enloe, 1988; Thompson, 1982). Extensive work was also undertaken on the concept of militarism itself (e.g. Berghahn, 1981; Mann, 1987; Skjelsbaek, 1979; Vagts, 1959; Shaw, 1988). But such sustained research and reflection has largely disappeared since the early 1990s, revitalized only in part by US adventures in Iraq and Afghanistan (e.g. Bacevich, 2005; Johnson, 2004). In some fields, most notably political geography, discussion of militarism and militarization remains strong, so much so that political
geographers can claim with some merit that ‘the topic of militarization has been resurgent in recent years’ (Bernazzoli and Flint, 2010; Bryan, 2010; Kuus, 2009; Loyd, 2009; Woodward, 2005). The same could not be said from the perspective of International Relations, however. Some, especially historical sociologists (e.g. Mann, 2003; Shaw, 2005) and feminist scholars (Enloe, 2000, 2004; Sjoberg and Via, 2010; Whitworth, 2004), have kept discussion of militarism alive. But there has been little uptake of their concerns in the wider discipline. Contemporary textbooks on world politics, IR theory, and security and strategic studies make few, if any, references to militarism and militarization. Even more tellingly, while since the mid-1980s IR has gone through an intellectual revolution – marked by the collapsing hegemony of conservative realism and a proliferation of assorted critical approaches, as well as a huge amount of epistemological, conceptual and theoretical innovation – none of this seems to have inspired much reflection on militarism. The systematic academic study of militarism and IR appears to be a thing of the past.

The evident contradiction between militarized social and international relations on the one hand, and little or no academic debate on the other, is paradoxical, and provides the motivation for this volume. Based on papers presented at an international, interdisciplinary conference held at the University of Sussex in May 2009, plus additional invited contributions, it brings together researchers working on militarism, militarization and international politics from a diverse range of theoretical perspectives. The guiding objectives of the conference were to identify the current state of play in the recent literature on militarism; to reflect on what we might learn from earlier discussions of militarism, as well as how these earlier understandings might require updating and revision; to analyse a wide range of contemporary practices and dimensions of militarism; and to consider how both the concept and practices of militarism and militarization might be studied, empirically and theoretically, at the crossroads between international political economy, security studies and IR theory.

The resulting book has a two overarching aims: to make the case for a renewed research agenda for IR centred on the concept of militarism; and to provide a series of empirically focused and theoretically informed case studies of contemporary militarism in practice. It does not, and is not intended to provide either a comprehensive survey of contemporary militarism, or a unified or exclusionary theoretical framework. The individual chapters’ substantive focuses vary widely, some considering militarism and militarization in specific national or regional contexts, from the US to China to the Middle East. Others concentrate on the extension or expansion of militaristic practices into new social, political and economic domains such as space, or popular culture. But there are many countries and domains on which the book does not touch, or discusses only in passing. Theoretical frameworks also vary widely, with chapters being variously informed by liberal, realist, Marxist, Gramscian, post-structuralist, constructivist and Weberian understandings of militarism. To this extent, the book aims to present a diverse and eclectic body of research on militarism, which hopefully is a stimulus to further research and debate.
The book is loosely structured into three parts. Part I provides a set of theoretical reflections on militarism, including chapters by Martin Shaw, with a historical sociological reading of militarism and one of its contemporary iterations, ‘global surveillance war’; by Simon Dalby, utilizing a critical geopolitics framework to argue that taken-for-granted geographical representations are key to the legitimization of violence; and by Nicola Short, utilizing a neo-Gramscian framework to theorize recent transformations in militarism in the global South. This section also includes an interview with James Der Derian, focusing on his recent film Human Terrain, as well as on key themes relating to militarism – culture, simulation, virtue, networks – within his research. Part II analyses militarism in relation to security, including chapters by Yoav Peled, on transformations in Israeli militarism and the role of the ‘enlightened public’ therein; by Dirk Kruijt and Kees Koonings, documenting the transformation of militarism in Latin America, from ‘political armies’ to the war against crime; by David Kinsella, on the role of the arms trade in the international diffusion of militarism; and by Andrew Bacevich, surveying contemporary US militarism (this chapter being abridged from his seminal 2005 book The New American Militarism). Finally, Part III turns to political economy, including chapters by Iraklis Oikonomou, offering a Marxist reading of the militarization of EU space research and policy; by Ramy Aly, on the history and political economy of the military and militarism in Egypt; and by Kerry Brown and Claude Zanardi, on the role of the Chinese People’s Liberation Army (PLA) in business and politics.

This introductory chapter both sets out a case for reviving the study of militarism in IR, and introduces and contextualizes the contributions to follow. We start by reflecting on why the concept of militarism has been so marginal within post-Cold War debates in IR, emphasizing in particular the political and intellectual ascendancy of liberalism, and the dominant disciplinary concerns with ‘new wars’, ‘state failure’, ‘human security’ and ‘securitization’. In each case we contend that these new emphases and conceptualizations do not provide solid grounds for jettisoning militarism, either as a concept or object of analysis. We then set out a more positive case for studying militarism, first by considering contending definitions and conceptions thereof, and theoretical approaches thereto; and second by giving an overview of some of the key empirical dimensions of, and recent transformations in, militarism and militarization. In each of these sections, we both map existing literatures, and discuss, compare and contrast the particular contributions in this volume. A brief conclusion reflects on some of the difficulties that we, as editors, have faced in pulling the book together, and on some of its consequent limitations.

Whatever happened to militarism in IR?

Since the end of the Cold War, discussion of militarism has fallen out of fashion in IR. It would be wrong to overstate this development: as Short shows (Chapter 4 in this volume), this change has been relative, not absolute. That said, it is noteworthy that the concept of militarism has been largely bypassed by IR’s
‘post-positivist revolution’, and that this has occurred without it having been subjected to any sustained or profound theoretical critiques. As this suggests, the notion of militarism has fallen by the wayside less because it is fatally flawed, than because it has become deemed passé. There are, we suggest, three main reasons behind this: the post-Cold War political and intellectual hegemony of liberalism; the rise of influential discourses on ‘failed states’ and ‘new wars’; and the predominance of discussions of ‘security’ and ‘securitization’, as against ‘militarism’ and ‘militarization’, within critical IR and security studies. However, each of these reasons, we argue, actually provides quite thin grounds for discarding or bypassing the concept of militarism.

The revolutions of 1989–91 and the consequent global ascendency of liberal capitalism provide the most fundamental structural reason why recent IR scholarship has been so inattentive to militarism. Discussions of militarism during the Cold War era had focused predominantly on the Soviet–American superpower rivalry, on arms racing, and on what E.P. Thompson (1982) labelled ‘exterminism’. With the end of the Cold War, not only was this era-defining rivalry decisively resolved, but global military spending sharply declined, as also did the incidence of inter-state armed conflicts and the proportion of authoritarian and military regimes worldwide. In the view of much mainstream as well as critical scholarship in IR, an era structured by geopolitical conflict had given way to one defined, for good or ill, by democratization, economic liberalization, globalization, global governance and peace dividends. Moreover, it was widely assumed – building upon a long tradition of liberal thought on the subject – that these processes of liberalization and democratization would inexorably challenge and undermine militarist ideologies, practices and structures. At the apex of such thinking, democratic peace theorists came to consider it no less than an ‘empirical law’ that democratic states did not and would not go to war with one another (Levy, 1988: 661–2); whilst others extended this thesis into claims that democracy, trade and high economic development are systemically correlated with a decline in the incidence and severity of warfare (Souva and Prins, 2006; Lacina et al., 2006), and that democratic states are more internally pacific too (Rummel, 1997; Hegre et al., 2001) – a claim which to this day informs accepted international doctrines of ‘liberal peacebuilding’ for societies emerging from civil war (Doyle and Sambanis, 2000; Richmond, 2007). Right across these intellectual and policy terrains, it has been widely if often only tacitly assumed that liberalism is ascendant, that liberalism and militarism are antithetical, and that militarism is thus on the wane.

The problem with such claims is that liberalism is neither incompatible with militarism, nor quite as hegemonic as its proponents imagine. Though rarely recognized by liberal or democratic peace theorists, liberal states – whatever their pacific inclinations towards other liberal states – actually have an unusually high propensity towards war with illiberal ones (Doyle, 1983). The leading liberal states of the nineteenth and twentieth centuries, Great Britain and the United States respectively, fought more wars during these periods than any others (Blum, 2006: 162–220; Carr, 1946). The current leading liberal democratic state,
the US, accounts for over 40 per cent of global military spending (SIPRI, 2011), and has military personnel in over 150 states (US DoD, 2011). Historically, liberal ‘civil society militarism’ visited genocide upon large swathes of the non-European world (Mann, 1996). Moreover, internal political and economic liberalization in the post-Cold War era has often been quite compatible with the entrenchment or extension military power (as a number of the contributions in this volume demonstrate). This is not to deny that some world regions and social domains have witnessed progressive demilitarization. But the claim, or suggestion, that the post-Cold War era has been characterized by a general decline in militarism simply cannot be sustained.

This being the case, it begs the question as to why critical scholarship, in particular, in International Relations has not in recent years been more attentive to militarism and militarization. This brings us to our second factor: the rise of influential policy and academic discourses, including within critical IR scholarship, on ‘state failure’, ‘new wars’ and ‘human security’. Since the end of the Cold War, ‘failed’, ‘collapsed’, ‘weak’ and, more recently, ‘fragile’ states have routinely been identified as the pre-eminent threat to international security (Helman and Ratner, 1993; Rotberg, 2003; Ghani and Lockhart, 2008; Department for International Development, 2009: 5). The underlying premise of this discourse is that it is in the weakening or collapse of the Weberian legitimate monopoly over violence, rather than in the assertion or extension of state power, from which the central challenges to human well-being and world order presently derive – whether this be internally, for example in increasing civil violence and population displacement within failed states, or internationally, for instance through the use of ungoverned territories by drug cartels or international terrorists. In parallel to this failed states discourse, it has been widely claimed that the post-Cold War era is characterized by a qualitatively new type of warfare ‘associated with globalisation and the disintegration of states’ (Kaldor, 2005: 491). Where classical ‘old wars’, it is asserted, were fought between formal state military institutions, in support of declared military, political or ideological objectives, and in a manner that was productive of state power, ‘new wars’ are thought to be internal or transnational rather than international, to be disorganized and informal, to revolve around identity conflicts and economic predation, and to reverse rather than support processes of state-building (Duffield, 2001; Kaldor, 1999; Münkler, 2004; Snow, 1996). A key policy and academic response to the violence associated with new wars and state failure has been the promotion of ‘human security’, with its emphasis on legitimate political authority, promotion of human rights and the rule of law, reform of institutional structures, and policing and community interventions to bolster the forces of civility in the context of the blurred boundary between war, crime and organized violence (Glasius and Kaldor, 2005; Kaldor, 2007a; Muggah and Krause, 2009). In all three discourses of ‘failed states’, ‘new wars’ and ‘human security’, then, contemporary political violence is seen essentially as a problem of declining and de-institutionalized state capacity. Viewed thus, the traditional IR problematique of military power and violence has been superseded by the problem of internal lawlessness and
anarchy – with the corollary, if this is indeed correct, that the study of militarism is also somewhat outdated.

It is, however, not correct that the problematique of internal lawlessness has superseded that of military power. Indeed, the way the concepts of ‘state failure’, ‘human security’ and ‘new wars’ have been used has obscured our understanding of the predominant forms of war-making, war-preparation and military power in contemporary world politics, which remain predominantly state-based and retain powerful connections to state formation. For, not only has there not been, empirically, a ‘proliferation of armed conflicts within states’ since the end of the Cold War (ICISS, 2001: 4), but in addition conceptually, the ‘new wars’ discourse is premised on idealized and Eurocentric models of both inter-state and civil warfare (Barkawi and Laffey, 2006; Kalyvas, 2001). And for its part, whatever its policy world appeal, the ‘failed states’ discourse has been extensively critiqued as descriptively shallow and misleading, and as more suited to justifying interventionism than informed analysis (Boas and Jennings, 2007; Call, 2008; Hill, 2005; Jones, 2008). Many so-called ‘failed states’ have very powerful state structures including strong military and related paramilitary and intelligence institutions, whose influence is highly uneven, however, especially in territorial peripheries. ‘Human security’ interventions, meanwhile, are not, in principle, incompatible with analyses of militarism: they can be deployed as a critique of the traditional normative privileging of state over individual security. Yet in practice, human security discourse has focused on inter-personal violence, gang warfare and economically motivated crime (Geneva Declaration Secretariat, 2011; Human Security Centre, 2006), in the process underplaying the extent and nature of state, paramilitary and organized group involvement in this and other violence. Often, violence that may superficially appear to be between non-state actors is in fact no such thing: the ongoing ‘narco-war’ in Mexico, for example, which has resulted in 40,000 fatalities since 2007 but is not categorized as a ‘war’ in civil war datasets, is being fought not just between drug cartels, but with the active complicity of the Mexican state (Hernández, A., 2010; Wood, 2011). Furthermore, ‘human security’ analyses tend to sideline the wider influence that organized military actors exercise on social relations above and beyond direct lethal violence and war preparation, and whose significance goes beyond the number of people they kill.

The enduringly organized and centralized nature of contemporary political violence becomes even clearer if we adjust our conception of statehood and recognize its heterogeneity and historicity. In International Relations debates, the label ‘state’ and the notion of ‘sovereignty’ are usually reserved for those institutions which are internationally recognized as such, even if their actual control over territory is in certain respects limited: IR mostly follows a ‘juridical’ as against ‘empirical’ understanding of statehood (Jackson, 1990). During the late Cold War, the dominant approach to IR, neo-realism, focused on states (viewed as functionally undifferentiated and homogeneous ‘billiard balls’) and on their interaction within the international arena. The many post-positivist critiques of this dismissed neo-realism but with it also a strong analytical or critical focus on
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states and their militaries. Yet the problem with these critiques was that they too readily accepted neo-realism’s problematic understanding of states. States remain the central institutions of world politics and global order, both legally and practically. But they are far from homogenous in form and function, and some barely deserve the name. Simultaneously, there are institutions of organized political violence that do not possess international recognition, but nonetheless have strong state-like characteristics (in that they are organized, centralized, have institutionalized military and administrative capabilities, and exert control over territory) and may in certain cases possess more ‘state-ness’ than recognized national states (Clapham, 1998; Davis, 2003). Organized military and related institutions remain the central agents of the preparation for, and conduct of, political violence worldwide. And much of what we often call ‘non-state’ violence is conducted by paramilitary groups, militias or other organizations which are, both politically and financially, dependent clients or proxies of states (e.g. Alden et al., 2011). Most contemporary battle deaths and war deaths still occur at the hands of states and associated para-state actors.

Sudan illustrates all of these points well. Often characterized as a ‘failed’ or ‘failing’ state (Helman and Ratner, 1993; Rotberg, 2003), Sudan is nonetheless ruled by a powerful military authoritarian regime, which has a measure of legitimacy in northern Nile states, but much less within geographical peripheries, especially the (newly independent) South and the western region of Darfur (e.g. de Waal, 2007; Jok, 2007; Mamdani, 2009). It has experienced extensive political violence, of course, but this, far from being disorganized, has revolved primarily around attempts to variously extend or resist state power. Moreover, much of this violence could quite properly be described as ‘militarized’. The post-2003 violence in Darfur, for instance, while it was led on the ground mainly by the horse- and camel-riding Janjaweed militias, was organized and financed by the military regime in Khartoum. The Janjaweed often wore regular army uniforms, operated in the company of regular Sudanese army units, and would regularly undertake their attacks hot on the heels of bombing raids by Sudanese Air Force Antonov An-12 transporters, combat helicopters and MiG fighters (Prunier, 2005). An analysis of militarized state structures is crucial to understanding patterns of contemporary political violence in purportedly ‘failed states’ such as Sudan. The claimed rise of ‘new wars’ and ‘failed states’, in sum, does not provide good grounds for a retreat from analysis of militarism; to the contrary, such currently fashionable formulations systematically understate the enduring reach and violence of military power.

A third major reason why militarism currently receives such little attention within IR lies, we suggest, in the discipline’s predominant concerns with ‘security’ and more recently ‘securitization’. Since 1945, with the establishment of the UN Security Council, the de-legitimization of wars of aggression, and the shifting fortunes of ministries of war, defence and security, the concept of ‘security’ has gradually become the central organizing concept for both the practice and the study of international affairs (Buzan and Hansen, 2009; Neocleous, 2000). Moreover, since the end of the Cold War, discourse on ‘security’ has
been significantly extended beyond a concern with the territorial defence of the nation-state – with new referents such as human, global and environmental security (e.g. Kaldor, 2007a; Tickner, 1992; Dalby, 2002), and a range of emergent issues such as migration, trafficking, disease, health and minorities becoming significant new focuses of policy intervention and analysis (e.g. Neal, 2009; Lobasz, 2009; Elbe, 2010; Jutila, 2006). Critical IR scholarship on security, in turn, has attended above all to the ways in which claimed ‘security threats’ are framed, constructed, ‘securitized’, and as a result elevated above normal democratic politics, to politically problematic or at best ambiguous effect. If ‘militarism’ was a key concept and critical tool during the darkest periods of the Cold War, its parallel today, at least in European IR, is ‘securitization’ (Buzan et al., 1998; Balzacq, 2010; Wæver, 1995; Williams, 2003). With this transformation in discourse has come a change in the objects of critique – away from a core concern with the excessive influence of arms, and military institutions and ideologies, on domestic and international politics, to a broader concern with the practice and legitimation of exceptional ‘security’ measures, regardless of whether these be the work of the military, or instead of intelligence services, domestic law enforcement agencies, the media, or any number of state, private sector and international ‘securitizing actors’. Implicitly and sometimes explicitly, this securitization research ‘[q]uestion[s] the primacy of the military element and the state in the conceptualization of security’ (Buzan et al., 1998: 1). Viewed thus, the traditional IR problematique of military power and violence has been displaced not only by the problem of failed states, but also by the problematique of security (Bernazzoli and Flint, 2010).

There is much to be said for such arguments, especially in light of the increased importance attached to international surveillance, border control and homeland security since the events of 9/11 – and to this extent, the securitization framework advances a far wider research agenda than that suggested by the concept of militarism. In other regards, however, the opposite holds true. First, since the central aim of securitization research is to interrogate the mobilization of a normative concept, ‘security’, it inexorably follows that this research is highly discourse-centric in its methods and objects of analysis, whether analysing specific securitization acts (e.g. Atland, 2009; Herington, 2010; Cui and Li, 2011) or the broader discursive contexts within which security threats are constructed and emerge (e.g. Balzacq, 2005; Hansen, 2011; Roe, 2008). It is for this reason that securitization research almost always operates within a constructivist or post-structuralist theoretical framework. The concepts of militarism and militarization, by contrast, suggest a central focus on the institution of war (its preparation, conduct and effects) and on military organizations (that often have enduring and widespread influence outside of war). They are therefore amenable to either discursive or materialist treatments, and from any number of theoretical perspectives (as the contributions to this volume testify). Second, the central focus of securitization research on the extension of security thinking to new threats and domains means that in consequence it has had very little to say about those areas where security discourse has traditionally been applied. It has
contributed little to our understanding of, for instance, international military alliance structures, or the international arms trade, or military–industrial relations, or the continuing political and social power of military institutions right across Asia and Sub-Saharan Africa. Arguably, then, though securitization research has undoubtedly broadened the focus of security studies beyond the military, it has simultaneously detracted critical attention from the problems of militarism and militarization. Moreover, and third, securitization research’s broadening of the security problematique, and downgrading of the problem of militarism, both has an ‘explicitly European flavour’ (Huysmans, 1998: 480), and is premised on a liberal democratic model of ‘normal politics’ that does not speak to political realities across much of the global South (CASE Collective, 2006: 455). Securitization research is limited then, not only in its focuses on discourse, and on emerging security threats, but also in its Eurocentrism. The concept of militarism, by contrast, is of global relevance and applicability. While in certain respects the concepts of security and securitization broach a wide and important research agenda, in other respects the concept of militarism has much more extensive analytical – and therefore also normative political – purchase.

If the arguments above appear somewhat conjectural, corroborating evidence for them can be found in the intellectual trajectories of those erstwhile scholars of militarism who, during the 1990s, shifted their research much closer to Northern security and development priorities. Mary Kaldor, for example, shifted from a quasi-Marxian analysis of militarism and ‘modes of warfare’ (1982a, 1982b), to becoming one of the most prominent scholars of ‘new wars’ and also ‘global civil society’ (2003). Robin Luckham’s research formerly focused on class, international conflict and militarism, especially in Sub-Saharan Africa (Luckham, 1977a, 1977b; Luckham and Bekele, 1984a); but in the post-Cold War period, his work moved in large measure towards a focus on ‘complex emergencies’ and ‘security sector reform’ (Luckham and Cliffe, 1999; Luckham and Cawthra, 2003). Keith Krause formerly wrote on state formation and military development in the Middle East (1994, 1996), but his current focus, especially as editor of Small Arms Survey, centres on small arms proliferation and armed violence in the global South and human security. As these examples suggest, post-Cold War political shifts, new donor funding agendas (plus also the increasing reliance of Northern academia on these donor funds – tellingly, all of the ‘new wars’, ‘security sector reform’ and ‘small arms’ research above has attracted significant donor funding), and consequent shifts in intellectual discourse and priorities, are key to understanding why discussion of militarism is currently so marginal within IR.

Definitions, conceptions, approaches

While the above suggests reasons why there is currently so little discussion of militarism within IR, and also argues for the concept’s continuing relevance within an era of liberalism, security politics and so-called ‘new wars’, it only hints towards answers on the question of how militarism should (or might) be
approached and understood. Broadly speaking, there are five ways in which militarism has been defined or conceptualized. In turn, these different conceptions of militarism mostly correspond to distinct theoretical assumptions or perspectives. Many (but by no means all) of these conceptions and approaches are represented in this volume.

Historically, first, militarism was often understood as an ideology – one that glorified war, military institutions, and the prevalence of martial values in society. Thus seminally for Vagts (1959: 13, 14, 17), militarism referred to that ‘complex of feelings which rank military institutions and ways above the ways of civilian life, carrying military mentality and modes of acting and decision into the civilian sphere’; for him, militarism was characterized by ‘qualities of caste and cult, authority and belief’, and involved ‘an emphasis on military considerations, spirit, ideals, and scales of value, in the life of states’. Emerging in the second half of the nineteenth century, this type of definition became particularly popular in relation to Germany around the time of the First World War, where militarism assumed ‘the importance of a basic cultural value’ (Berghahn, 1981: 32). However, such ideology-centred conceptions are now rare, both because wars and militaries are no longer subjects of straightforward glorification, and because it is reductionist and limiting to essentialize militarism as ideology (see Shaw, Chapter 2 in this volume). While many late twentieth-century writers, from Mann (1987: 71) to Enloe (1988: 7), have understood militarism as involving a ‘set of attitudes’ or ‘set of values and beliefs’, this has usually been as part of a broader interpretation, encompassing material as well as ideational elements. Indicative of this, none of our contributors deploy an essentially ideological reading of militarism.

A second and more common understanding is behavioural, conceptualizing militarism as the propensity to utilize force to resolve conflict. Eide and Thee (1980: 9), for example, define militarism as ‘the inclination to rely on military means of coercion for the handling of conflicts’; while Kinsella (Chapter 8 in this volume) defines it as a ‘disposition or proclivity . . . to employ military over non-military means of conflict resolution’. By such understandings, militarism is defined in terms of, and identified by, actual policy outcomes. The value of such conceptions, of course, is that, by contrast with ideological definitions, they do not assume that a propensity to use force is necessarily or essentially rooted in martial values or the glorification of war. The weakness of such outcome-oriented interpretations, however, is that they tend to neglect or downplay the political or sociological processes underlying war and military power. Moreover, as several of the contributions herein make clear, militarism draws upon numerous sources for its power and legitimacy, not just on acts of violence; and can remain entrenched even in relatively pacific (at least international) contexts (Kruijt and Koonings, Chapter 7 in this volume).

A third conception of militarism, and also militarization, equates them with military build-ups, and especially with quantitative increases in weapons production and imports, military personnel and military expenditure. This is the dominant conception of militarism within contemporary peace research, meshing
neatly with the latter’s predilection for statistical analyses (e.g. de Soysa, 2008; Gibler and Sewell, 2006; Murshed Syed and Mamoon, 2010). Ross (1987), for instance, understands and measures militarism by six indicators: levels of military expenditure, arms imports and arms production; size of armed forces; and number of wars and military regimes (Ross, 1987; SIPRI, 2011). Such an approach no doubt lends some degree of quantitative and scientific robustness to the study of militarism. However, as with the behavioural understandings discussed above, build-up conceptions offer little by way of insight regarding the social embeddedness, power or meanings of militarism, or regarding those social, political and indeed international structures and processes in which military build-ups are so powerfully rooted (for a critique of the thinness of this ‘militarization thesis’, see Shaw, 1991). Of course, this is not to deny that build-up scholarship on militarism can be of great value, as the large and influential literatures on military arsenals and the arms trade surely testifies. In this volume, Kinsella adopts such an understanding, combining a behavioural understanding of militarism with a build-up conception of militarization – this dual focus on capabilities and outcomes being illustrative of a broadly realist take on the problematique of militarism.

Fourth, institutional conceptions of militarism centre on relations between military and political institutions, and particularly on situations where the former are deemed to exert excessive influence over the latter. This type of understanding is characteristic of a civil–military relations approach (Huntington, 1957; Finer, 1962; Perlmutter, 1997), which is premised on broadly liberal democratic assumptions about the importance of demarcating the sphere of political decision-making and debate from that of military power, and keeping the military ‘above’ or ‘out of’ politics. In their analyses of militarism in Latin America and China respectively, both Kruijt and Koonings (Chapter 7) and Brown and Zanardi (Chapter 12 in this volume) adopt such an institutional understanding of militarism – in both cases focusing on the internal rather than international dimensions of militarism, as is characteristic of this approach. The self-evident value of doing this is that it directs attention towards those internal political processes and structures which often lie behind military build-ups and the resort to force. However, institutional conceptions arguably still remain too narrow. They do not speak clearly to non-liberal democratic societies, and especially communist systems, where there may be no clear distinction between civilian and military elites, and where the norm of an apolitical military may not apply (Perlmutter and LeoGrande, 1982: 780). Moreover, as Ben Eliezer (1997) observes, militarism can arguably be as deeply ingrained in ‘militaristic societies’ where military thinking, images and means are privileged without the military itself taking power, as in praetorian states with periodic military coups. Coup d’état, or other forms of intermittent incursion of the military into politics, do not by themselves provide an adequate barometer of militarism.

While liberal institutional conceptions revolve around and valorize the civil–military distinction, our fifth and final category – sociological understandings of militarism – seek from various different theoretical perspectives to problematize
and transcend the civil–military divide, by understanding militarism as embedded within society. Most of the contributions to this volume rely, whether explicitly or implicitly, on just such a sociological understanding of militarism. Shaw, both in this volume and elsewhere, sets out perhaps the most comprehensive articulation of a sociological reading of militarism, as referring to ‘the penetration of social relations in general by military relations’ and the ‘relationship of war preparation and society’ (Chapter 2; 1991: 9–15). In Shaw’s work, the concept of ‘military’ is used not as a noun to refer to an institution, but to describe ‘all social relations, institutions and values relating to war and war preparation’ (2003: 106); and militarism, in turn, is understood as the tendency or extent to which these military relations influence social relations as a whole. Shaw’s specific interpretation of militarism arises from a neo-Weberian historical sociology, which emphasizes amongst other things the autonomous impacts of violence, war preparation and geopolitics in constituting social relations; in this, his work has close affinities with that of Mann (1986, 1993). But by no means are all sociological conceptions of militarism informed by such neo-Weberian premises. During the Cold War era, Marxism provided fertile soil for sociological analyses of militarism, whether in Kaldor’s analyses of modes of warfare, E.P. Thompson’s critique of nuclear ‘exterminism’ – as he famously stated, the US and USSR do not have, but are, military industrial complexes (1982: 22) – or numerous other analyses of military–industrial relations; in the present volume, Oikonomou, Peled and Short all develop (very different) Marxist readings of militarism. Post-structuralism can also provide a fertile resource for analysing the sociology of militarism, as illustrated by Dalby’s (Chapter 3) analysis of the discursive and cinematic underpinnings to contemporary imperial practice; and elsewhere, feminist sociologies have explored the mutually constitutive relations between militarism and patriarchy (Cock, 1991; Cockburn, 2010; Enloe, 1988; Segal, 2008). Sociological approaches to militarism, in short, are many and varied. What unites them, however, and wherein lies their value, is their focus on the embeddedness of militaries, and war making and preparation, in society. In addition, unlike those approaches which conceive of militarism essentially as ideology, or the resort to violence, or military build-ups, or indeed the excessive influence of military institutions on politics, sociological approaches understand militarism broadly, as in principle encompassing all of these other elements. In this sense, many empirical studies which eschew explicit theorization nonetheless implicitly rely on a broadly sociological understanding of militarism (see, for example, Bacevich, Chapter 9 this volume). For all these reasons, a sociological understanding of militarism provides the overall guiding framework for this volume, as indicated by the definition used right at the beginning of this chapter.

Some would dispute the very concept of militarism, of course (though as noted earlier in this chapter, the relative decline in discussion of militarism within IR has been more a function of changing intellectual fashions, than of any systematic critique). Der Derian (Chapter 5 in this volume) declines to use the concept, partly out of a philosophical aversion to ‘isms’, and partly on the
grounds that the notion of ‘militarism’ is premised on a normative attitude of ‘anti-militarism’, something that he views as inappropriate to the complexities of contemporary networked societies. Whatever one may think of these post-structuralist informed arguments, it is clear that the question of the meaning and value of the concept of ‘militarism’ is far from resolved.

These conceptual and theoretical questions aside, two further sets of issues stand out in considering how to approach the study of militarism. The first of these is methodological, relating especially to the scale at which militarism is analysed. Many studies of militarism use an essentially ‘statist’ or ‘methodologically nationalist’ (Chernilo, 2006) framework for studying militarism, this being especially so within country case studies, within studies of civil–military relations, and also within those quantitative analyses which compare different levels of militarization between states. Many of the contributions to this volume operate with just such a nation state-centred understanding of militarism, despite their very different conceptual and theoretical premises (e.g. Bacevich, Brown and Zanardi, Kinsella, Peled). Others, by contrast, are implicitly or explicitly critical of such state-centrism, emphasizing instead the ways in which militarism is structured by, or embedded within, transnational, imperial or global social relations. Informed by research in critical geopolitics, Dalby argues that contemporary militarism is rooted in, amongst others, statist representations of enmity, implying in turn that critical engagement with militarism requires forms of scholarship which escape from such a ‘territorial trap’ (Agnew, 1994). From a Marxist perspective, Oikonomou points to the trans-national processes which are leading to the militarization of European space research and policy. Shaw (2005; this volume) meanwhile, emphasizes that there exists a ‘new Western way of war’ – ‘risk transfer militarism’ – which is not limited to particular states, but is instead a practice of the emerging ‘global state’ (Shaw, 2000a). Elsewhere, Stavrianakis (2010, 2011) argues that the international arms trade, often seen as the last bastion of national sovereignty, is marked by hierarchical and mutually constitutive imperial relations. Our premise as editors is that both ‘levels of analysis’ – considered not in isolation, but in co-constitutive interaction – are crucial to any adequate analysis of militarism, and hence that militarism should be understood as a simultaneously social and international phenomenon.

A final set of issues is normative, relating to analysts’ ethico-political approach towards militarism, the nature and extent of their critical engagement, and the relationship between critique and analysis. Most scholarship on militarism, including that in this volume, is doubtless informed by some degree or form of anti-militarism – though what this ‘anti-militarism’ means and involves varies widely. For some (e.g. Kinsella, Chapter 8), critique is directed towards the excessive build-up of military capabilities, whereas for others (e.g. Oikonomou, Chapter 10) the implicit critique is of military power per se and its relationship to capitalism. With two exceptions, however, the contributions to this volume do not explicitly discuss or draw upon a notion of anti-militarism. The first exception is Shaw, who warns that the possibility for opposition to militarism depends on both the character of militarism itself in any given place and
time, as well as on wider socio-economic, political and cultural patterns. The second exception is Der Derian who, as already noted, rejects the idea of ‘anti-militarism’ – favouring instead a politics of ‘counter-militarism’, which involves responding to the diffuse character of contemporary military power with broader forms of critical engagement beyond simple opposition, such as dialogue, subversion and mimicry. In Human Terrain and in the interview in this volume, Der Derian also reflects on the involvement of academics, and especially anthropologists, in recent US military operations, as part of ‘human terrain teams’ – Der Derian’s ‘critical practice’ (2009a) in relation to these involving an emphasis on the complexity of these academic-military interactions, rather than any outright condemnation.

For most of the contributors to this volume, and for the editors, an implicit working principle is that the study of militarism should not be over-determined by normative commitments. In keeping with this, many of the chapters consider not only the negatives of, and violence associated with, militarism, but also its (actual or claimed) positive and productive dimensions. For instance, Aly (Chapter 11) and Kruit and Koonings (Chapter 7) discuss the role of militaries as agents of economic and political development, and guardians of national constitutions, building upon literatures dating back to the 1960s on the military as modernizing forces within ‘new nations’ (e.g. Finer, 1962; Huntington, 1957; Janowitz, 1960; Pye, 1961); while Bacevich (Chapter 9) considers the tendency within contemporary US politics and society to view the military as a bearer of superior values. There is also, of course, a large and varied literature on the productivity of war and violence for social, economic and political development (Cramer, 2006; Barkawi, 2008; Reno, 1998), which is however not represented here. From the perspective of the editors, these are all important issues, which should not be ignored or downplayed out of normative opposition to militarism. Political commitments are doubtless one motivation for scholarship, but the new research agenda that we propose is fundamentally sociological and analytical, not ‘anti-militarist’.

Contemporary militarism in practice

While one aim of this book is to revive the concept of militarism within IR, the second is to provide some evidence of recent transformations in militarism. The coverage here is by no means comprehensive, but four broad themes stand out.

A first theme relates to changes and continuities in national and international political economies of militarism. On the one hand, as a number of the contributions to the volume testify, there have been significant transformations in structures of military production (Brown and Zanardi, Oikonomou), and in levels of military spending (Bacevich). And yet on the other, there are continuities in the patterns of the arms trade (Kinsella), and entrenched economic and institutional interests of national militaries (Siddiqa, 2007; see also Aly in this volume in relation to Egypt). What is most remarkable about these continuities is that they have often occurred within contexts of economic and political liberalization.
However, as a number of our contributions show, in practice there has often been little contradiction between the rise of neo-liberalism and the continuation of militarized social relations. In relation to Israel, for instance, Peled analyses how, since the collapse of the peace process with the Palestinians, economic liberalization has been accompanied and legitimized by an increasingly ethno-nationalist form of political discourse, which in turn has fed increasingly militarist social attitudes. And at a more general level, Short argues that neo-liberalization has led, not to a waning of militarism, but instead to its re-articulation through networks and actors criss-crossing the public-private divide.

A second broad theme relates to the increasing importance of culture as an arena for militarism. Thus Dalby and Peled (both this volume) examine how particular works of literature and film can variously shape or reveal militarist attitudes. Der Derian argues (this volume; 2009b) that popular entertainment is now so closely tied in with the military that a focus on the ‘military–industrial complex’ is anachronistic, and needs replacing with a broader consideration of ‘military–industrial–media–entertainment networks’ (or ‘MIME-NET’). Bacevich and Shaw (both this volume) emphasize that contemporary militarism and war have been transformed by a new aesthetic of violence, involving ‘smart weapons’ and real-time televural representations of war-as-spectacle (see also Mann, 1988). In a rather different way, Der Derian (this volume) contends that owing to its interventions in Afghanistan and Iraq, culture has now become a key concern of the US military; ‘culture’, he argues, has become the ‘killer variable’ of contemporary US warfare. As all of these contributions emphasize, culture is a hugely important site for the consolidation or transformation of, or contestations over, militarism.

Third, a number of contributions explore the extension or expansion of militaristic practices into new domains, quite apart from culture. Oikonomou and Shaw examine, albeit in very different ways, the use of surveillance technologies for the extension of militarism, as well as for what Oikonomou calls the ‘militarization of space’. Kruijt and Koonings argue that Latin America’s militaries are taking on new responsibilities, and obtaining new power and legitimacy, in the domain of internal law enforcement. And Short emphasizes that processes of neo-liberalization and privatization have led to the migration of militarism across the public-private divide, to a range of new non-state actors in the global South, especially private military/security companies (Abrahamsen and Williams, 2007; Avant, 2005). Elsewhere, it has been widely argued that recent years have witnessed a militarization of humanitarianism, as closer and closer relations develop between security and emergency relief and development organisations within conflict zones (Byman, 2001; Lischer, 2007).

Last but by no means least, many of our chapters identity specific national or regional transformations in militarism. Thus on the US, Bacevich shows that Wilsonian liberalism has been utterly transformed during the Cold War and post-Cold War eras, such that the US is now on many levels a highly militaristic society. In China, meanwhile, Brown and Zanardi emphasize that while the Chinese military is more professionalized and less politicized, its economic role
has increased with liberalization; the overall impact on the balance between military and civilian leaders remains unknown. On the EU, Oikonomou identifies processes of militarization at a Europe-wide level, notwithstanding the post-Cold War declines in national military spending within most EU states. On the Middle East, Aly (on Egypt) and Peled (on Israel) show how militarism and military institutions continue to exercise powerful holds over their societies, this being despite these two states having been at formal peace with one another since 1979, and, in Egypt’s case, despite the overthrow of the Mubarak regime in early 2011. And on Latin America, Kruijt and Koonings show that the ‘political armies’ which dominated Latin American politics through much of the twentieth century have been transformed – not only towards apolitical professionalism, however, but also through the militarization of law enforcement.

Conclusion

Is militarism waxing or waning? This volume does not provide a conclusive answer to this question, and perhaps none is possible. The contributions show that there are social domains and regions of the world where militarism is being transformed, determined by other political, economic, technological and cultural transformations. They demonstrate that there are regions and domains where militarism exercises enduring power and influence, even in the face of challenges – such as economic liberalization, democratization, and the reduction in levels of inter-state warfare – that might be thought to undercut militarized attitudes, institutions and social relations. They show that military power is being extended into new arenas, despite (or perhaps to some degree because of) processes of quantitative demilitarization. And some also show that anti-militarist political movements are evidently in retreat in certain parts of the world. There is clearly much more to be said about continuities and transformations in contemporary militarism. It is hoped that this volume, modest as it is, serves as a stimulus to further research on the subject.

The contributions to this volume demonstrate the transformations and ongoing salience of militarism in contemporary international politics. But there are various aspects of militarism which are conspicuous by their absence herein. In particular, none of the contributions focus centrally on the gendered or racialized character of militarism (though the chapter by Aly does touch on the former), or on the key regions of Sub-Saharan Africa and South Asia. This is regrettable but not for want of trying or a result of analytical exclusion. These lacunae are in some cases the outcome of logistical difficulties encountered on the long road to producing an edited volume. In other cases, however, they are a function of the problems that much contemporary scholarship seems to have in engaging with the concept of militarism. This applies especially to scholarship on Sub-Saharan Africa, where ‘failed states’, ‘new wars’ and ‘security’ discourses are especially hegemonic. As editors we hope that these limitations of this volume will be taken up as a challenge by other scholars to help in broadening the scope of research on militarism and militarization.