

Social democracy for a zero-sum world

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In a world defined by scarcity and trade-offs, Reform is seizing the moment. Paul Mason argues that unless Labour adapts social democracy to this new reality, by shifting its focus to security, redistribution and class solidarity, the left risks ceding power to the far right.

The Labour tradition faces a crisis unparalleled in its history. Its voter coalition is fragmenting in two directions. Its growth strategy is neutralised by a five-fold increase in the cost of government borrowing. The foundations of its foreign policy have been blown away by Donald Trump. Labour's massive Commons majority rests on just 34% of the vote and was delivered by a split on the right that may not last. With Reform currently polling above 30%, if an election were held today, Labour would not only face defeat, but the ignominy of becoming the first government of the European centre-left to hand power directly to the far right.

At its most acute this is a crisis of language. No senior Labour politician can tell the truth about Reform's surge: that it is based on a racist radicalisation that has swept through parts of working-class culture. Nor can they state the obvious about the rise of religious sectarian politics (whether Muslim, Jewish, or Hindu) – that it reflects the failure of the UK's long-term integration project. They cannot accurately describe what Donald Trump is – a fascist-aligned autocrat hostile to the alliances UK national security is built on – nor what he did, which is to stab Britain in the back by withdrawing support for NATO, and treating us as adversaries in a trade war.

As to facing the root cause of these connected crises, that is going to be hard. The entire history of social democracy, from Bernstein and the Webbs to Crosland in

the 1950s and Blair in the 1990s, has been premised on the idea that capitalism is, or can become, a positive-sum game. Now, thanks to the massive debt overhang from 2008 and capital's resulting risk aversion, together with negative demographics and climate change, that assumption must be questioned.

The world's major powers have begun to act as if they are in a zero-sum game. For America to prosper, China must not; for Russia to exist, Ukraine must be dismembered; for Great Power authoritarianism to succeed, the European project must disintegrate. That is the logic of systemic competition.

Over the past decade, this same zero-sum logic has worked its way into UK domestic politics: for my community to thrive, yours must not; for me to feel secure, your identity must be suppressed. The leitmotif of every radio phone-in has become: if somebody else wins, I lose.

If Labour had a theoretical tradition, with think-tanks engaged in political philosophy as well as focus groups, it would be better equipped to face what is coming. But it does not. Labour politicians are more comfortable with principles and instincts than with theories. Ministers have begun to preface all policy announcements with the mantra: 'the world has changed' – but they seem incapable of describing exactly how.

It is only once we fix that problem that we will be able to answer the question: 'how do we defeat Reform?'. Because, beyond all Farage's showbiz and hypocrisy, he and his followers have accepted what Labour has not: that the zero-sum game is real. Until we evolve something akin to a 'zero sum socialism' and build a new voter coalition for it, delivery and good governance alone will fail to turn things round.

The meaning of Reform

It is comforting to see Reform as the creation of one man. Discredit Farage and the thing implodes. Even some of those trying to advise him, such as Dominic Cummings, fear privately that the project will collapse once showmanship meets the realities of multivalent politics.

But that is to misunderstand what Reform is. If we take the five groups identified by HOPE not hate as comprising its current voter coalition – disgruntled old Tories, ex-Labour voters, young men radicalised online, manual workers with insecure jobs, and those simply disillusioned with mainstream politics – it becomes obvious that the Reform phenomenon has been created *from below*.¹

It is just the latest expression of a far-right radicalisation among a minority of the British population reaching right back to the 943,598 votes scored by the BNP in

the 2009 European Parliament elections. That later morphed into the hard core of the Brexit vote, and by the time Farage achieved his referendum victory, he was fronting not just a movement but a subculture and a belief system.

At its core is the idea that the past was better. You can see this thought being expressed almost religiously in thousands of local Facebook groups: 'Old Photos of Town X'. The problem is – as every working class person over the age of 60 can tell you from experience – they are, in a way, correct.

If you look at any map showing where Reform is strong, where the Brexit Party was strong, where there was a massive majority for Brexit, or where the BNP did well in 2009, the darkest shading will always be in the places Thatcherism destroyed. Places that once had thriving high streets, high-paid work, high social cohesion and rising educational standards – but now have the opposite.²

In the ten years since the Brexit vote, a deeply discontented set of people have begun to win an argument in their communities about *why* the past was better – namely, because Britain had a white, ethnic monoculture. By 'win', I do not mean they have achieved a majority, nor even overt support from the 30% currently saying they will vote Reform. But they have made such views acceptable. To understand why, we need to examine the three factors driving the Reform surge: insecurity, identity and information networks.

Insecurity, identity, and information networks

Labour has put fighting economic insecurity at the heart of its programme – yet we still don't fully vocalise what the effects are. There are 4.3 million self-employed workers in the UK, ranging from Deliveroo riders to software engineers. But at their core are the construction, repair and delivery trades known colloquially as 'white van man'.³

There has been no authoritative demographic analysis of those convicted for violent disorder during the August 2024 race riots. However, scanning the individual trial reports, many were men in their 40s and 50s: often skilled manual workers and self-employed. These were people with high social capital and influence in their community. To understand why they were triggered into acts of violence, to which most pleaded guilty to shorten the inevitable jail sentences, we must understand the zero-sum world in which they live.

To be a self-employed manual worker is to face not just economic precarity, but constant personal insecurity. Take your eye off your tools for a moment and they are gone. Park your van in a hurry and that's a £160 fine due to the local council. Miss a target set by the subcontractor you're working for, and around the corner

is another small firm willing to undercut your rates. Theirs is a world of instant penalties.

For many, everywhere except their family and immediate community is a hostile environment, and every stranger a potential competitor. In this world, what matters – in a way that they simply don't in the corporate or public sectors – are 'face and place': reputation, connection, who you know. And in multi-cultural Britain, many such connections depend on ethnicity, to an extent politics neither acknowledges nor understands.

A Labour cabinet minister told the Times in June that 'The truth is there are a lot of people whose lives have been shit for a long time...They need to see results otherwise they will roll the dice again with Reform.'⁴ That's correct and brutal, but as a Labour movement we need to stop defining 'shit lives' as simply economically disadvantaged.

What is 'shit' about being working class right now is a mixture of physical insecurity, powerlessness, a decaying physical environment, a disintegrating civil society in which only rulebreakers seem to prosper, and the lack of any sense that things will get better.

Yet, while there are ample Labour policy offers to doctors, nurses, teachers, engineering workers – there has never been an economic programme for white van man. Reform, with its promise to slash taxes and restrict immigration is aiming at an open goal, even before you add in the cultural fears it plays on.

If the progressive, university-educated and politically literate half of the working class had responded to far-right radicalisation with a strategic offer to the small-town, manual workforce, based around the things both groups can agree on, we might be in a different situation. Unfortunately, it failed to do so.

Corbynism recognised the problem. The narrator in the party's *Our Town* video in 2018 told workers: 'Once the backbone of this country, we've been sold short by a political and economic system that's been unchallenged for far too long'.⁵ However, Corbyn turned a deaf ear to what people in such towns actually wanted: more police on the streets, solid support for the armed forces, a commitment to nuclear deterrence and a tough but fair migration policy. All he could offer them was to implement Brexit, albeit in a form he was never willing to specify.

Since then, identity politics has become not only central to the ethos of the urban salariat; it has become institutionalised and ritualised. This, in turn, has convinced some white workers that the redistribution 'game' based on class – which they once had a chance of winning by voting Labour – has been replaced by a game based on identity, which they cannot win.

What has spread this conviction from the minority who held such convictions in 2019 to the 4.1 million people who voted Reform last year?

First, a crucial role was played by the small boats crisis. Less than 2,000 people crossed the channel in 2019, the overwhelming majority of them Kurds from Iran. The following year the trafficking began in earnest, was boosted by the exit of Western powers from Afghanistan after 2021, and is currently running at 18,400 for the year to date.⁶ Compared to legal net migration, which topped a million in 2021, these numbers are small – but they play graphically on the fear of ‘invasion’ by ‘men of fighting age’ that forms the premise of the far right’s guiding myth: the Great Replacement Theory. In addition, they amplify the powerlessness of the state.

Second, Reform has been boosted by a wider upsurge in sectarian politics, reflected in the increasing political salience of religious nationalisms, above all the success of the so-called ‘Gaza independents’ (many professing religious conservative social attitudes) in Muslim communities across the country. In Burnley, for example, in the May 2025 County Council election, voters in Burnley Central East elected an 18-year old Muslim woman committed to ‘end free mixing’ between men and women in public places, while Reform came second. In all six seats contested in the town, Labour’s vote collapsed – with Muslims voting for independents and white people voting for Reform.

Finally, we must not under-estimate the impact of Musk’s takeover of Twitter, and of the second election victory of Donald Trump. The international far right has changed the rules of engagement in the information war and is winning it.

All the major social media platforms are now algorithmic vectors for racism and misogyny. The world’s most powerful politician and the world’s richest man have combined not merely to amplify Reform’s politics, but to push it to the extremes, with Musk repeatedly signal-boosting Tommy Robinson and those supporting him.

Private research now suggests that Reform is beating Labour, and indeed all other parties, in its online social media traffic by margins of ten-to-one. Labour, for sure, has a slick, top down, online content game. But Reform has supporters who are prepared to say what they think, in the blunt racist terms now permitted on most social media platforms, creating the kind of ‘organic content’ that is the holy grail for social media strategists. All successful social media operations now rely on boosting authentic stuff created by real people, rather than manufactured propaganda. And there is evidence that both Russian bots and MAGA influence networks are driving Reform’s traffic at massive scale.

It is these three factors – rising personal insecurity, the left’s determination to prioritise identity over class, and support for Reform’s online insurgency by the

MAGA and Putinist networks – that are driving Reform. One could add in Labour’s mis-steps: the freebies, the slander of constituents in WhatsApp groups, the winter fuel debacle and welfare cuts – but in normal circumstances these might have benefited the Tories, not Reform.

Conservative visions of catastrophe

In response to the emergence of zero-sum politics, the Conservative right have begun to catastrophise. Their brains seem willing to tune out the likelihood of climate chaos after 2050, but dial up the likelihood of social breakdown next week. King’s College London professor David Betz wrote in April that the preconditions for civil war exist across Western Europe, with Britain and France the most likely venues due to their large Muslim minorities.⁷ Dominic Cummings has claimed that in Whitehall, discussions among security and policing professionals have begun to address what they might do in response.⁸ Tory MP Neil O’Brien complained in a Substack post that a confluence of demographic crisis, stagnation and mass migration are driving perfectly ordinary people to desire a coup d’état.⁹ Each of these essays has resonated widely in the subconscious of the Conservative right, prompting despair tempered only by the reassuring knowledge that all this is Labour’s problem.

In contrast to such fatalism, Labour has begun to act to mitigate the risk. In its new National Security Strategy the government has identified a broad range of domestic extremism threats, ranging from the far right and Islamist groups to individuals obsessed with violence.

However, a simple law enforcement approach to disintegrating trust and cohesion is not enough. The party – which is unique in being rooted in the trade unions and drawing elected representatives from every minority community in Britain – needs to become the active embodiment of a new narrative itself, and give every public body explicit ‘resilience’ duties. For example, it should require every institution – from schools and universities to Strategic Authorities, churches and Mosques – to have a stated counter-disinformation strategy. If we don’t want to sit doomscrolling every time a major crime is committed, hoping against hope that it does not trigger a repeat of the Southport riots, we need the labour movement itself to be primed for activism on the streets in such situations – to calm and explain, rather than to exacerbate and inflame.

Labour’s response

The irony is that, on a practical level, Labour under Keir Starmer has responded adroitly to the obstacles it has faced. As early as May 2023, in her ‘Securonomics’

speech, Rachel Reeves spelled out that neoliberal globalisation is over, and that state intervention, re-shoring of production and place-based industrial strategy should be order of the day.¹⁰ As chancellor, she has now twice delivered an austerity-defying boost to public services, whose long-term impacts are heavily weighted to benefit the poorest half of the population.¹¹

In government, Labour has achieved trade agreements with Europe, India and the USA; met the riots of August 2024 with exemplary toughness; assumed leadership of NATO in the face of American backsliding, and delivered immediate reductions in NHS waiting times. John Healey was pitch-perfect during the Ukraine crisis, and as defence secretary has delivered the first reality-based defence strategy for 15 years, securing a long-term boost to defence spending that would have looked impossible a year ago.¹²

And yet Labour is despised. To be a Labour activist is to wake up every day to stereophonic anger. By the left we are told that we are ‘genocidaires’; that our record-breaking boost to NHS spending is ‘austerity’. From the right we face a barrage of lurid conspiracy theories and organised disinformation. The common language of these extremes is anger and hyperbole, which are in turn monetised by traditional media companies whose income from actual journalism has dried up.

There are solutions, but they don’t lie in the repertoire of the Labour past. This is not going to be remedied by a 1990s style ‘move to the centre’, nor by pursuing the chimera of AI-driven growth in a tragicomic parody of Harold Wilson’s ‘white heat’. Nor, as necessary as it is, will a determined Keynesian rearmament programme be enough on its own. That is because politics is no longer about economics: it is about *politics* – who gets what, and on what principles resource allocation decisions are made.

To win the next election, and to unite what we can of the electorate around a new national agenda, Labour needs to adapt social-democracy to the zero-sum world.

Zero-sum socialism

The defining attribute of a zero-sum game is that it is redistributive: a ‘pie-slicing’ competition for a pie that will not grow. If we accept that, in the short to medium term, economic growth will likely be sluggish, then the task becomes to redefine the terms of the redistribution game – shifting it forcefully from identity to class.

What this should mean is, for starters, every MP, and every group or faction within the Labour family, sticking rigidly to universalist language and the rhetoric of nation, class, community and family.

Survey the guidebook issued to delegates at Labour's annual conference and you'll see how little the party understands this. There are fringe events and receptions for almost every possible identity, religion, pressure group, foreign country, charity and even animal species. But almost nothing about class. The unions, thankfully, remain strident and effective in the defence of their members' interests – but that is not the same as fighting for an agenda that meets the needs and aspirations of working-class people as a whole.

After a year in power, I expect the fringe at this year's Labour conference will hike the volume of identitarian and sectoral attacks on Keir Starmer. He will be told he has betrayed Palestine, betrayed trans rights, 'thrown asylum seekers under a bus' – together with disabled people, the refuse collectors of Birmingham, and the UK's declining population of swifts.

I don't want to sound like Alexis de Tocqueville in his famous 1848 speech to the French parliament – but, comrades: you are sitting on a volcano that is about to blow.

Unless every interest group within Labour grasps that a clear class narrative combined with rapid and active class-based redistribution measures is our only viable weapon against far-right radicalisation, then no amount of 'delivery' – on NHS waiting times, or apprenticeships, or even managing by some herculean effort to actually 'smash the gangs' – will prise Reform voters away from their illusions.

This is not about 'message discipline'. It is about adapting social democracy to a world where the pie is not growing fast enough to meet every need; and where the pressing geopolitical and security threats push their way into the 'urgent/important' box, no matter how justified other causes are.

To give itself freedom of action, the party leadership must first do something that will be hard but unavoidable: it must either scrap its pledge to avoid raising taxes, or scrap its fiscal rules, or scrap the Office for Budget Responsibility. Most probably it will have to do all of the above – and more – to create the fiscal space needed to meet the growing challenges to democracy. In a low growth economy, plagued by periodic inflation spikes and the second order effects of Trump's trade war, and faced with the need to hike defence spending even higher than the 3.5% now pledged, the rules and promises made in a different reality will be millstones around the government's neck.

Rachel Reeves' Securonomics strategy of 'crowding in' private investment through targeted public investment is the right one. However, it is being implemented in the face of headwinds strong enough to make it stall. When a sailboat faces headwinds, it has to tack aggressively to progress. Labour will need to

likewise. Making Securonomics work will require more public ownership, more state direction, more borrowing, and more progressive taxation – including new taxes on wealth. But getting the economics right is only a subordinate part of the strategy Labour needs to adopt.

Restoring public authority

One of the strongest discontents driving both alienation from politics and the swing to Reform, is the conviction that the state no longer works. There are rules, but only ‘decent’ people follow them. The police have the technology to identify and fine every motorist breaking the speed limit, but they can do nothing about fare dodgers on public transport, kids in balaclavas terrorising town centres, or the people who steal your bike, phone or car.

Compared to the serious resources needed to fund rearmament, and to the hard choices we’ll have to make between funding the NHS and funding welfare, restoring the rule of law would be cheap. At the centre of Labour’s programme of restoring social trust should be a compulsory, single digital identity scheme – not left to a second term but adopted now, in mid-stream, and implemented by 2029. The Tony Blair Institute estimates it would cost around a billion to set up, but save double that, in terms of increased revenue and decreased benefit fraud, within three years.¹³ But the case for it is about more than economics: it is about trust.

The UK needs to become a place where everyone is who they say they are: where people cannot evade taxes, laws or regulations simply by disappearing into a greyzone of anonymity and non-compliance. Remove the greyzone and you remove the pull factor that makes economic migrants risk their lives in the Channel alongside genuine asylum seekers, and which makes it easy for thousands (the number is unknown) of people to overstay their visas and remain in work.

Combined with a single digital ID, we should create a single national police force. This already exists, effectively, to combat terrorism, serious and organised crime, and through targeted interventions into local forces by the National Police Chiefs’ Council. But with technology likely to become central to effective policing of the national and international challenges – from drug trafficking to organised financial crime – we can no longer afford the patchwork of data standards, methodologies, and replicated back-office functions that comes with the current arrangement.

The goal of this combined move to national policing and digital ID should be stated clearly: we are going to war on the fare dodgers, tax dodgers, the scammers, the people traffickers, the phone stealers, the drug dealers and the money

launderers – and we are enlisting every decently-minded person and institution in Britain to help us restore the rule of law in every community.

If all this offends liberal sensibilities, we should remember that at no point in the past century has social democracy been defined by liberalism. Its defining mission is to advance the interests of the working class, not the abstract individual of Rawlsian theory - and the disintegration of trust, cohesion and personal security have become pressing issues for the people we are supposed to represent. Redistributing personal security and social cohesion can be done a lot faster and more cheaply than redistributing wealth, so we should prioritise it and get started.

Controlling migration

Probably the hardest change Labour needs to make is the one Starmer began in his ‘island of strangers’ speech. The Immigration White Paper is a landmark in social-democratic thinking, and reflects a new understanding that legal, economic migration needs to be managed in the interests of the people already here. That his words were ripped out of context, with Labour backbenchers and press pundits competing with each other for kudos by denouncing him as ‘Powellite’ shows, yet again, that many in the Labour family simply do not understand what needs to be done in the zero-sum world.

At last year’s Labour conference, I sat with a group of Labour MPs from the Midlands who told me that, even in communities that are now majority BME, there is rising opposition to economic migration. Where white families once complained that Caribbean and Pakistani families were taking the social housing, it is now the latter who complain that their kids cannot find homes they can afford.

Given the current rate of demographic ageing, and the growing numbers of working age adults who cannot work due to illness, we are going to need inward migration. But it is vital to re-establish consent by controlling it; by reducing the proportion of low-paid workers who will – according to the OBR – never be able to make a net positive economic contribution; and by rapidly matching public service spending to the local needs generated by legal migration.

The path to re-election

With Labour in power, there is a narrow window to make these big changes. At the centre of Labour’s new offer to working class people should be – as Starmer has promised – security and defence, with a rapid reindustrialisation programme

to go with it. But as we make these changes, we need to understand the risks they create to the party's left.

On the doorsteps in 2024 it was clear that many Green voters are now what American pollsters call 'values voters'.¹⁴ They no longer care whether splitting the progressive vote leads to a local Tory winning, or even to a Tory government; their vote is meant to express their identity. The same is likely to be true of the 300,000 Muslim voters who either stayed at home or backed sectarian religious candidates. In Wales, increasingly, Plaid Cymru is advancing for the same reasons.

Faced with this threat, the only thing Labour can do is give such left-wing 'values voters' tactical reasons to believe that the next general election result matters more than their feelings. They may vote for us with a long list of regrets – over cuts to welfare or the international aid budget, over our tough stance on migration, or over the need to spend billions on defence contracts with companies whose record on corporate governance and value for money has been dire.

But they will vote Labour, tactically where necessary, if front bench politicians spell out convincingly what the stakes are. If Nigel Farage becomes prime minister, then the same farce that his councillors are inflicting on county councils across England will be unleashed at the level of the British state, which has very few constitutional checks on executive power. Scotland will leave the UK at the first opportunity, and the Northern Ireland peace process will likely break down.

Farage, whose favourite political leader is Putin, and whose ally is Donald Trump, would place UK national security in severe jeopardy and, long before he won any election, would destabilise the financial markets in ways that would make the Truss fiasco look like a minor blip.¹⁵ In the aftermath, our democracy would be broken.

If, after Labour has delivered a step-change in crime-fighting, reduced legal migration to sensible levels and gone to war on the criminals and the scammers, 20-plus percent of the voters still want to put Farage in power, then – having given it our best shot – we will need to mobilise a broad defensive coalition, including the Greens, Lib Dems, liberal Tories and the Celtic nationalist parties – to stop him.

In the meantime, Labour needs to devote serious time and resources to shoring up the defences of our democratic system. We need – in this parliament – to tighten restrictions on foreign funding. We also need to use the provisions of the recent Online Safety and National Security Acts to aggressively confront the social media companies actively promoting disinformation and hate.

Most of our democratic defence mechanisms are designed to work after the event – for example the Political Parties, Elections and Referendums Act, which outlaws electoral manipulation, lying and anonymous publicity, but failed to prevent such offences during the 2024 election. We need new laws that give the guardians of democratic accountability the powers to react in real time: finding and preventing, for example, the likely surge of foreign cash that will flood into Reform Ltd as it begins to accept cryptocurrencies, and debarring candidates who break electoral rules.

The challenge is enormous: there has never been a zero-sum Labour offering, and there has also never been a threat to democratic stability on this scale. Gradual redistribution while ‘growing the pie’ has always been the social democratic way in the past, but we now find ourselves in a world where capital has become so resistant to entrepreneurial risk, and so dependent on rent-seeking and the inequalities it generates, that growth is suppressed while need flourishes.

Labour’s decision to redistribute regional healthcare spending, slash development spending, restrict legal immigration and prioritise defence are all signs it understands the zero-sum world we are in. But the decisions will get harder. To explain them to a public punch-drunk from crisis will require a break from all our yesterdays.

Paul Mason is a journalist, writer, and film-maker. His most recent book is *How to Stop Fascism: History, Ideology, Resistance* (Allen Lane, 2021).

Notes

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