

POLITICAL THEORY – CONCEPTS AND DEBATES

**CBCS CORE COURSE (B.A. HONOURS)
II SEMESTER**

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COURSE INTRODUCTION: POLITICAL THEORY- CONCEPTS AND DEBATES

According to the British political scientist *David Held*, political theory is a 'network of concepts and generalizations about political life involving ideas, assumptions and statements about the nature, purpose and key features of government, state and society, and about the political capabilities of human beings'. Political concepts are a set of concepts which are necessary for any serious reflection on political life, as argued by *Jakob Norberg* and hence, it becomes clear that for a sound understanding of political theory, it is important to grasp and understand political concepts. *Richard Bellamy* and *Andrew Mason* have further said that all political argument employs political concepts as they are the basis of building blocks required to construct a case in favour of or against a political position. Political concepts are very rarely politically neutral and they are always contested as the opposing groups emphasise their own definitions and try to promote their own interpretations at the expense of others. Experts highlight that political concepts are essentially contestable and variations in their use showcase differences in empirical, theoretical and normative assumptions. Hence, a political concept can be understood from various perspectives. Political concepts not only describe political life, but also the areas of political disagreement. Concepts like liberty, equality, justice, rights and multiculturalism have been discussed in this course in basic detail to cover all the major viewpoints on them. These concepts are inter-related and for a clear understanding of political theory, it is always important to also understand how one political concept is related to the other.

This course gives an introduction to political theory covering main political concepts and debates aimed at developing analytical thinking. It is divided in five blocks.

Block 1 deals with Liberty and has three units. Unit 1 is titled Liberty – as Absence of External Intervention, Unit 2 is Liberty – as Self-Determination and Unit 3 is Alienation, Oppression and Freedom (Important Issue: Freedom of belief, expression and dissent).

Block 2 discusses the political concept of Equality in three units. Unit 4 is Equality before Law and Equality of Opportunity. Unit 5 is titled Equality: Sameness and Difference and Unit 6 is Differential Treatment and Equality of Outcome (Important Issue: Affirmative Action).

Block 3 deals with various dimensions of Justice. Unit 7 is Justice as Fairness (Distributive Justice). Unit 8 is titled Idea of Just Desert and Unit 9 is Justice in a Global Context (Important Issue: Climate Change and Environmental Hazards).

Block 4 highlights the concept of Rights and has three units. Unit 10 is The Idea of Rights: Entitlements and Boundaries. Unit 11 is Bases of Rights: Legal, Moral and Natural. Unit 12 is Rights and Obligations (Important Issue: Human Trafficking).

Block 5 is the last block in the course that deals with major debates in political theory. These debates prompt us to consider that there is no settled way of understanding concepts and new insights and challenges help in understanding new political debates. Unit 13 is Law and Civil Disobedience (When is Resistance Justified?). Unit 14 is Rights and Universality (Are Human Rights Universal) and Unit 15 is the last, titled Multiculturalism and Tolerance (How do we Accommodate Diversity in a Plural Society?). Each unit has *Check Your Progress Exercises* which would help students in examining their conceptual understanding of the subject. At the end of the course, *Suggested Readings* cover a list of useful books for further analysis.



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BLOCK -1 LIBERTY

Block 1 covers the concept of liberty. Liberty is one of the three ideals that the French Revolution sought to achieve, apart from equality and justice. Liberalism has an obvious emphasis on liberty and John Locke gave the negative view of liberty. The concept has come a long way since then with the development of the concept of positive liberty in the 20th century advocated through the writings of J S Mill, T H Green and others. A different interpretation was given by Isaiah Berlin who tried to reconcile the negative and positive views of liberty. Unit 1 is titled *Liberty – as Absence of External Intervention*. Unit 2 focuses on *Liberty – as Self-Determination* while Unit 3 is titled *Alienation, Oppression and Freedom* (Important Issue: Freedom of belief, expression and dissent).



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UNIT 1: LIBERTY – AS ABSENCE OF EXTERNAL INTERVENTION*

Structure

- 1.0 Objectives
- 1.1 Introduction
- 1.2 The Meaning of Liberty
- 1.3 J S Mill's Notion of Liberty
- 1.4 Isaiah Berlin and the Two Concepts of Liberty
- 1.5 Marxist Critique and the Idea of Freedom
- 1.6 Other Contemporary Ideas on Liberty
- 1.7 Let Us Sum Up
- 1.8 References
- 1.9 Answers to Check Your Progress Exercises

1.0 OBJECTIVES

Liberty is considered a core concept and a fundamental democratic value in modern political and social theory. The notion of liberty emerged in the context of the formation of modern civil society and political authority. While the concept is intimately associated with liberal thought, liberals have looked at the notion in different ways. Marxists are critical of liberal notions of liberty and would refashion the concept on entirely different assumptions of individual and society. In this unit, we shall look at different perspectives on liberty, and try to understand the meanings, justifications and limits of the notion. The unit has been divided into different sections, each dealing with a specific aspect of the notion. There are a set of questions at the end of the unit for self-assessment, and a list of readings to help enhance your understanding.

1.1 INTRODUCTION

The idea of liberty as a core principle of liberal thought is most commonly understood as 'absence of restraints'. The notion of liberty emerged in the context of the establishment of new socio-economic and political relationships in modern Europe. At the basis of the notion was the idea of a rational individual, capable of taking reasoned decisions. The rational individual, it was thought, was capable of self-determination; in other words, capable

*Anupama Roy, Senior Fellow, Centre for Women's Development Studies, New Delhi, Adapted from Unit 19, EPS-11

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of taking decisions which concerned his or her self. In order to develop his capacities, the individual required freedom from all kinds of social, political and economic constraints. Thus, the idea of liberty as absence of restraints, or a *sphere of autonomy* of the individual, developed. At the same time, however, the fact that within a social organization the individual is not alone and exists in relation with other individuals, required that an equal claim of other individuals to their spheres of autonomy should be recognized. In order that the respective claims of all individuals to autonomy can be realized with *minimum conflict*, it was imperative that a system of restraints and regulation was worked out and adhered to by everyone. The theories of *social contract* put forward by philosophers like Hobbes, Locke and Rousseau put forth the idea of liberty as absence of constraints. At the same time, they also proposed the framework within which individual freedom was to unfold. Thus, the idea of political community was based on a simultaneous recognition of the capacities and autonomy of individuals and the imperatives that all should be subjected to a common set of constraints on their liberty. Thus, it must be understood that liberty, which in common understanding means freedom, or absence of constraints and obstacles to individual action, and is considered a democratic ideal, has always been conceived as occurring within a *set* of specific constraints in social relationships. There are always limits to what is seen as acceptable forms of liberty in modern democratic societies. In the section which follows, we shall look at the meaning of liberty, focussing on its elements and the justifications for constraints on liberty.

1.2 THE MEANING OF LIBERTY

As mentioned in the introduction, liberty means freedom from, or absence of restraints. A person may be considered free or at liberty to do something when his or her actions and choices are not hindered or constrained by those of another. It is important to understand that constraints refer to impediments imposed by political and other authorities. Thus, imprisonment, bondage or slavery, subjection to laws, etc., may be seen as referring to conditions of unfreedom or absence of liberty. While states of unfreedom like imprisonment or subjection to laws may appear as constraints on liberty, we know that modern democratic social and political organisations are founded on legal and institutional structures, which aim at ensuring *equal consideration* of each individual's liberty. No society will, therefore, have an unlimited 'right to liberty'. Each society will have a set of restrictions on liberty, which are justified by the fact that people accept these restrictions as the best possible conditions in which liberty could be maximised.

The understanding of liberty as 'absence of restraints' or 'absence of external constraints' is generally described as negative. The negative nature of liberty appears in *two* different senses:

- a) In the first, *law* is seen as the *main* obstacle to freedom. Hobbes, for instance, described freedom as the 'silence of the laws'. Such a view

sees freedom as limited only by what others deliberately prevent individuals from doing. This understanding would, therefore, appear to imply a definite *limit* upon both *law* and *government*. Philosophers like John Locke have, however, pointed out that a commitment to liberty does not mean that the law should be abolished. Rather, it means that law should be restricted to the protection of one's liberty from encroachment by others. Locke suggested therefore, that law does not restrict liberty, it rather enlarges and defends it.

- b) The second view sees liberty as 'freedom of choice'. *Milton Friedman*, for example, in his work, *Capitalism and Freedom* (1962) proposes that 'economic freedom' consists of freedom of choice in the marketplace – the freedom of consumer to choose what to buy, the freedom of the worker to choose his job or profession and the freedom of the producer to choose what to produce and whom to employ. 'To choose' implies that the individual can make *unhindered* and *voluntary* selection from a range of different options.

While talking about liberty, a distinction is often made between negative and positive notions of liberty i.e., between the idea of 'absence of external constraints' and 'the existence of conditions which enable or facilitate'. In other words, the *distinction* between 'freedom to do' something and *actually being able* to do it. To be free or at liberty to do something is not to be restrained or prevented from doing it. While to be able to do is to have the *capacity*, financial or otherwise, to do something. For example, one may be free or unrestrained to take up any job, yet, one may not have the qualifications or the economic resources which may make one's candidature worthwhile. Political theorists often make this distinction between liberty as an absence of restraints and the conditions which make liberty worthwhile. A starving person who is legally free (not prevented from) to eat in an expensive restaurant, may in fact, enjoy *no* liberty on the basis of the *legal freedom*. The freedom to eat in this case will require some positive action by the state. It is this reasoning that has been used to justify social legislation designed to increase opportunities for individuals. By such positive action, the state is said to be not only decreasing inequality, but increasing liberty.

The negative conception of liberty is a characteristic of a strand of English political thought represented by *Jeremy Bentham*, *James Mill*, *John Stuart Mill*, *Henry Sidgwick*, *Herbert Spencer* and the *classical* and *neo-classical economists* who supported the claims of individuals to break free from unnecessary restraints of *arbitrary* government. The main political axiom of negative liberty was that 'everyone knows his own interest best' and that the *state* should *not* decide the individual's ends and purposes. Essential to the doctrine was the sanctity of the contract. Implicit in this assumption of sanctity was the understanding that the act of entering into a contract, even if the terms of the contract were restrictive of individual freedom, was an expression of liberty, of the exercise of individual choice. Thus,

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to this strand of thinkers, a person's liberty was a function of that area in which he was left *alone* and *not* related to the *quality* of action. The concept of negative liberty is best understood as a *doctrine* about the meaning of liberty. Although negative liberty is often condemned as the 'freedom to starve', this understanding is somewhat *misleading*. It does *not* necessarily put a prohibition on state intervention, but merely holds that this cannot be justified on the ground that it increases freedom, although arguments from the arena of inequality may be called into force for justification. However, the historical connection between negative liberty and the *laissez-faire* economics cannot be denied, and most of its advocates favoured a minimal state. The concept is neutral in the sense that it is compatible with a wide range of politics, and describes a condition of liberty without indicating whether it is good or not.

Criticisms of the negative notion of liberty have come from modern liberals, social democrats and socialists. The liberals in the nineteenth century, primarily *T H Green* and to some extent *J S Mill*, developed some of the earliest critiques of negative freedom. They felt that capitalism had done away with feudal hierarchies and legal restrictions (especially of economic pursuits), but it had also subjected large masses of people to poverty, unemployment and disease. Such circumstances were seen as hindering liberty as much as legal restraints and social controls. One of the first liberals to embrace the positive notion of liberty was T H Green (1836-82), who defined freedom as the ability of people 'to make the most and best of themselves'. This freedom consisting not merely of being left alone, but in having the *power to act*, shifting attention thereby to the opportunities available to each individual. The concept of positive liberty has been at the basis of the *Welfare State*. The idea has acted as the moving force behind social welfare provisions taken up by states, combining thereby freedom with equality.

In the section, which follows, Mill's notion of liberty will be taken up for study. Mill appears to endorse a negative conception of freedom, or the individual's sovereign control over his/her body and mind. In the ultimate analysis, however, Mill's notion of 'individuality' brought him closer to a positive notion of liberty.

Check Your Progress Exercise 1

Note: i) Use the space given below for your answer.

ii) See the end of the unit for tips for your answer.

1) Distinguish between positive and negative conceptions of liberty.

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1.3 J.S. MILL'S NOTION OF LIBERTY

J S Mill's *On Liberty* was influential in the academic debates in the 1960s. Mill's work is seen as an exposition of the negative concept of liberty. At the basis of Mill's arguments for individual freedom lay a strong sense of contempt for custom, and for legal rules and norms which could not be rationally justified. It is also sometimes argued that for Mill any free action, no matter how immoral, had some element of *virtue* in it, by the fact that it was freely performed. While Mill considered restraint on individual's actions evil, he did *not* consider restraints to be entirely unjustifiable. He felt, however, that within the society there was always a presumption in favour of liberty. Any constraints on liberty, therefore, had to be justified by those who applied them.

For Mill, the purpose of liberty was to encourage the attainment of 'individuality'. Individuality refers to the distinctive and unique character of each human individual, and freedom means the *realisation* of this individuality, i.e., personal growth or self-determination. It was the property of individuality in human beings that made them active rather than passive, and critical of existing modes of social behaviour, enabling them to refuse to accept conventions unless they were found reasonable. Freedom in Mill's framework, therefore, appears not *simply* as the absence of restraints but the *deliberate cultivation* of certain desirable attitudes. It is because of this that Mill is often seen as gravitating towards a positive conception of liberty. Mill's conception of freedom is also rooted in the notion of *choice*. This is evident from his belief that a person who lets others 'choose his plan of life for him' does not display the faculty of 'individuality' or self-determination. The only faculty he or she seemed to possess was the 'apelike' faculty of 'imitation'. On the other hand, a person 'who chooses to plan for himself, employs all his faculties'. In order to realise one's individuality, and attain thereby the condition of freedom, it was essential that individuals resist forces or norms and customs which hindered self-determination. Mill, however, was also of the view that very *few* individuals possessed the capacity to resist and make free choices. The rest were content to submit to 'apelike imitation', existing thereby in a state of 'unfreedom'. Mill's conception of liberty can be seen for this reason as *elitist*, since individuality could be enjoyed only by a minority and not the masses at large.

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Mill, as other liberals, emphasised a *demarcation* of the boundaries between the individual and society. While talking about reasonable or justifiable restrictions on individual liberty, Mill distinguished between *self-regarding* and *other-regarding* actions, i.e., actions, which affected the individual only, and actions which affected the society at large. Any restriction or interference with an individual could be justified *only* to prevent harm to others. Over actions that affected only himself, the individual was sovereign. Such an understanding of legal and societal constraints conveys the idea of a society in which the relationship between individual and society is not 'paternal', i.e., the individual being the best judge of his interests, law and society could not intervene to promote a person's 'best interests'. Similarly, the idea that an act can be constrained only if it harmed others, rules out the idea that some acts are intrinsically immoral and therefore, must be punished irrespective of whether they affect anyone else. Further, Mill's framework *rules out* 'utilitarianism', as enunciated by Bentham, which would justify interference if it maximized the general interest. Yet, the demarcation between the individual and the society is *not strict* in Mill in the sense that all acts do affect others in some way, and Mill believed that his principle did *not* preach a moral indifference towards the self-regarding behaviour of others, and felt that it was permissible to use persuasion to discourage immoral behaviour. Also, Mill strongly believed in the *instrumental* value of liberty in the promotion of social goods. This is especially true of his arguments for the complete liberty of thought, discussion and expression and the right to assembly and association. Mill felt that all restrictions on *free* discussion should be removed because truth would emerge from a free *competition* of ideas. It may be pointed out that in today's catalogue of liberties, freedom of expression is valued perhaps more than economic liberty as a democratic ideal. Free exchange between individuals is undoubtedly an important exercise of liberty and a society, which forbade all kinds of liberty and allowed *this* would still be relatively free.

1.4 ISAIAH BERLIN AND THE TWO CONCEPTS OF LIBERTY

In his now classic, *Two Concepts of Liberty* (first published in 1958) Isaiah Berlin tries to *reconcile* the negative and positive notions of liberty, i.e., the notion of liberty as the absence of restraints with the various views pertaining to its operation within the social context. For Berlin, the 'negative' notion of liberty can be understood by addressing the following question: 'What is the area within which the subject – a person or group of persons - is or should be left to do or be what he is able to be, without interference by other persons?' (1969, p.121). On the other hand, the positive sense is concerned with the answer to the question: 'what, or who, is the source of control or interference that can determine someone to do, or be, this rather than that?' (1969, p.122).

Positive liberty, on the other hand, does *not* interpret freedom as simply

being *left alone* but as ‘self-mastery’. The theory involves a special theory of the *self*. The personality is divided into a higher and a lower self. The higher self is the source of an individual’s genuine and rational long-term goals, while the lower self caters to his irrational desires which are short-lived and of transient nature. A person is *free* to the extent that his higher self, is in command of his lower self. Thus, a person might be free in the sense of not being restrained by *external* forces, but remains a *slave* to irrational appetites; as a drug addict, an alcoholic or a compulsive gambler might be said to be unfree. The main feature of this concept is its openly evaluative nature, its use is specifically tied to ways of life held to be desirable. The idea of positive liberty involves a special interpretation of the self and assumes not just that there is a realm of activity towards which the individual ought to direct herself/himself.

The notion suggests that the individual is being liberated when he or she is directed towards it. Critics of Berlin’s notion of positive liberty feel that a belief in positive liberty may involve the idea that all *other* values, equality, rights, justice etc., are *subordinate* to the supreme value of higher liberty. Also, the idea that the higher purposes of the individual are equivalent to those of collectivities such as classes, nations and race, may lead to the espousal of totalitarian ideologies.

Check Your Progress Exercise 2

- Note: i) Use the space given below for your answer.
ii) See the end of the unit for tips on your answer.

- 1) Discuss J S Mill’s views on liberty.

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1.5 MARXIST CRITIQUE AND THE IDEA OF FREEDOM

The Marxist concept of freedom is different from the liberal views, which have been discussed above. The main points of difference emerge from the Marxist understanding of the individual and society, the relationship between

Liberty

the individual and society, and the Marxist critique of capitalist society. While the liberal view is based on the centrality of the individual and his freedom of choice, the Marxists would see the notion of liberty based on the liberal notion of individual and society as conditions of *unfreedom*. For Marxists, the individual is not separated from other individuals in society by boundaries of autonomous spaces for the free exercise of choice. They are rather bound together in *mutual dependence*. The notion of individuality is likewise transformed into a notion of *rich* individuality, which emphasises the *social embeddedness* of the individual, the idea that individuals can reach a state of creative excellence and develop their capacities only in a society which seeks the development of all its members. For the Marxists, therefore, freedom lies in the development of creative individuality, and cannot be achieved in a capitalist society where individuals are separated by boundaries of self-interest and where they can only imagine themselves to be free when in reality they are bound by structures of exploitation. It is only in a society, which is free from the selfish promotion of private interests that a state of freedom can exist. Freedom, thus, cannot be achieved in a *capitalist* society.

These views have been articulated in Friedrich Engel's *Anti-Duhring* and Karl Marx's *Economic and Philosophic Manuscripts of 1844*. Engels discusses the notion of freedom as a state of *transition* from *necessity* to *freedom*. The state of necessity is defined by a situation in which the individual is subjected to another's will. Engels points out that man has the capacity to identify and understand the forces, which condition and determine his life. Man has, thus, obtained scientific knowledge about the laws of nature, which determine his existence and also learnt how to live with these laws in the best possible way. Ironically, man has not been able to break free from the *bondage* of the forces of production, which have historically kept him under subjection, or in other words, confined him to the realm of necessity. In order to reach a state of freedom, man not only has to have knowledge of human history, but also the capacity to change it. It is only with the help of *scientific socialism* that man can hope to leave the realm of necessity and enter the realm of freedom. Freedom is a significant component of the idea of communist society laid down by Marx and Engels in *Communist Manifesto*. It was only in a communist society where there will be no class exploitation that freedom will be achieved.

In his work, *Manuscripts*, Karl Marx avers that the capitalist society is *dehumanizing*. It not only alienates the individual from his true self, it separates him from the creative influences of society. Marx proposes that it is only by transforming those conditions in which alienation takes place, can freedom be restored. Thus, it was only in a communist society where the means of production were socially owned, and each member of society worked in cooperation with the other for the development of all, that true freedom could be achieved. Thus, in Marx's framework, freedom is seen

in a positive sense, denoting self-fulfilment and self-realisation, or the realisation of one's true nature. Marx described the true realm of freedom as 'the development of freedom for its own sake'. This potential could be realised, Marx believed, only by the experience of creative labour, working together with others to satisfy our needs. Under this framework, *Robinson Crusoe*, who enjoyed the greatest possible measure of negative freedom, since no one else on his island could check or constrain him, was a stunted and therefore *unfree* individual, deprived of the social relationships through which human beings achieve fulfilment. This notion of freedom is clearly reflected in Marx's conception of 'alienation'. Under capitalism, labour is reduced to a mere commodity controlled and shaped by de-personalised market forces. In Marx's view, capitalist workers suffer from alienation in that they are separated from their own true nature: they are alienated from the product of their labour, alienated from the process of labour itself, alienated from their fellow human beings, and, finally alienated from their 'true' selves. Freedom is, therefore, linked to personal fulfilment which only *unalienated labour* can bring about.

Check Your Progress Exercise 3

Note: i) Use the space given below for your answer.

ii) See the end of the unit for tips for your answer.

1) Discuss Marxist critique of liberty.

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1.6 OTHER CONTEMPORARY IDEAS ON LIBERTY

Apart from Berlin whose work is perhaps the most significant among the contemporary works on liberty, there are other thinkers who have discussed the idea of liberty elaborating upon the ideas expressed by thinkers on both sides of the ideological divide. *Milton Friedman*, like Mill and Berlin was a liberal who in his work *Capitalism and Freedom* developed a notion of liberty as a significant aspect of capitalist society. The freedom of exchange was an essential aspect of liberty. To promote this freedom, Friedman

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required the state to give up its concern for welfare and social security and devote itself to maintaining law and order, protecting property rights, implementing contracts etc. For Friedman, not only was liberty essential for free and voluntary exchange among individuals, it was only within a capitalist society that this freedom could be achieved. Moreover, it was economic freedom that provided the opportune and essential condition for political liberty.

In his work, *The Constitution of Liberty* (1960), *F A Hayek* has propounded a theory of liberty, which emphasises the negative role of the state. For Hayek, a state of liberty is achieved when the individual is not subject to the arbitrary will of another individual. Hayek calls this *individual freedom* and distinguishes it from other forms of freedom, establishing at the same time the primacy and independence of individual liberty from other forms of freedom, including political freedom. Hayek recommends that the original meaning of liberty as the 'absence of restraints' should be preserved. The enlargement of state intervention in the name of freedom would mean the demise of real liberty which consists in the freedom of individual from restraints.

Another group of thinkers evidently influenced by the *Marxist* notion of freedom emphasised that liberty as practiced in modern capitalist societies breeds *loneliness*. *Eric Fromm* (1900-1980) explained that in modern societies, aloofness was brought about owing to the separation of the individual from his creative capacities and social relations. This separation generated physical and moral aloofness in the individual affecting his mental well-being. It was only through creative and collective work that the individual could restore himself to society. *Herbert Marcuse* in his work *One Dimensional Man: Studies in the Ideology of Advanced Industrial Society* (1968), also explored the nature of alienation in capitalist societies. Marcuse asserts that the creative multidimensional capacities of the individual get thwarted in capitalist societies. Man is able to express himself only as a consumer constantly engaged in the satisfaction of his physical needs.

Check Your Progress Exercise 4

Note: i) Use the space given below for your answer.

ii) See the end of the unit for tips for your answer.

1) Discuss some of the other contemporary ideas on liberty.

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1.7 LET US SUM UP

The idea of liberty is at the core of liberal thought, which places the rational individual at its center and draws a boundary between the individual and his/her sphere of autonomy, the state and society. Liberty in its common understanding means an ‘absence of constraints’. In other words, it signifies a condition in which an individual who is capable of taking reasoned decisions pertaining to his/her own affairs is free to take any action without and restraints from outside, including state and society. At the same time, however, the notion of liberty, evolved at the same time as the idea of a political community and political authority. This simultaneous evolution has meant an *equal recognition* of the liberties of all individuals and the understanding that reasonable restrictions on individual liberty could be justified on the grounds that they provided the conditions in which individual liberty could be enjoyed without conflict. The idea of liberty as the absence of restraints is associated with a ‘negative’ notion of liberty. A ‘positive’ notion of liberty was articulated by thinkers like T H Green who took into account the conditions, which enabled an individual to be actually free. Thus, liberty as a positive notion consisted in having the power to act, and the opportunities which enabled action. The idea of the welfare state was premised on this idea which required the state to take positive steps to provide the conditions within which individuals could actually be free to act and develop themselves. While philosophers like J S Mill and Isaiah Berlin attempted to reconcile the two notions, Marxists felt that freedom could not be experienced in a capitalist society. A capitalist society, they emphasized separates an individual from his/her social contexts and from his/her own nature. Liberty as can be seen, has been understood differently by different strands of thought. It remains, however, a fundamental concept in democratic thought.

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1.9 ANSWERS TO CHECK YOUR PROGRESS EXERCISES

Check Your Progress Exercise 1

- 1) Highlight following points:

Liberty

- Negative liberty means absence of external constraints
- Positive liberty means existence of conditions which enable or facilitate better development

Check Your Progress Exercise 2

- 1) Highlight following points:
 - Mill highlighted negative concept of liberty
 - Opposed restriction on individual liberty
 - Distinction between self-regarding and other-regarding actions

Check Your Progress Exercise 3

- 1) Highlight Following points:
 - Unlike liberals, Marxists see mutual dependence between individuals and society
 - Capitalism alienates individuals from their true self and creative influences of society
 - Freedom can be restored in a communist society only
 - Example of Robinson Crusoe

Check Your Progress Exercise 4

- 1) Highlight ideas of Milton Friedman, F A Hayek, Eric Fromm and Herbert Marcuse

UNIT 2: LIBERTY AS SELF DETERMINATION*

Structure

- 2.0 Objectives
- 2.1 Introduction
- 2.2 Views of J. S Mill, T. H Green and L. T Hobhouse on Liberty
- 2.3 Isaiah Berlin's Two Concepts of Liberty
- 2.4 Neo-liberal View
- 2.5 Marxist Conception of Freedom
- 2.6 John Rawls' Conception of Freedom
- 2.7 Amartya Sen's Concept of Liberty
- 2.8 Feminist Conception of Freedom
- 2.9 Conservative View of Liberty
- 2.10 Post-Modern Concept of Liberty
- 2.11 Let Us Sum Up
- 2.12 References
- 2.13 Answers to Check Your Progress Exercises

2.0 OBJECTIVES

The aim of this unit is to explain the meaning of liberty and self-determination. After studying this unit, you should be able to:

- Explain the meaning of liberty
- Understand various views on liberty
- Distinguish between liberty and self-determination

2.1 INTRODUCTION

From theoretical point of view, self-determination means that an individual possesses the right to freedom and must be able to determine all the choices of life while the state has no role or interference of any kind to shape those choices. But the choices made should not be harmful to others and people's liberties should not be violated. In other words, individual must be able to choose where and how to exercise the freedom in his own interests and the law of a democratic and liberal country should respect that autonomy of choice. From a moral point of view, self-determination means that an

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individual has full ownership over his life and body and no one including the state can interfere with the choices made by the individual. From a conceptual point of view, it means that the individual is responsible to plan life according to his/her own conscious decisions. Freedom to make a choice lends dignity to the individual. If a decision is imposed, it involves violation of individual rights, dignity and also autonomy. Even though the forced decision might yield better results, but the individual might not be able to recognize it as a part of his own life. Nominalism explains self-determination as individualistic. Nominalists believe that only individuals are the original reality and the state and its institutions are artificial constructs. The state is derived from individuals. Therefore, the individual is a sovereign over his choices.

2.2 VIEWS OF J .S MILL, T. H GREEN ON LIBERTY

According to J S Mill, the relationship between liberty and the individual is explained in following words. “The only part of the conduct of any one, for which he is amenable to society, is that which concerns others. In the part, which merely concerns himself, his independence is, of right, absolute. Over himself, over his own body and mind, the individual is sovereign.” Mill emphasized the individual’s right to freedom. He differentiated between negative and positive liberty. Negative liberty, according to him, is an area where the state has no role of interference except in self-defense and the individual can exercise complete freedom in determining his own choices. Positive liberty is rational self-determination where the state interferes to grant the greatest amount of freedom to boost individual’s creative energies and for its self-development. In order to check the state’s interference and maximize the potential of individual, Mill also distinguishes between self-regarding actions and other-regarding actions. Self-regarding actions concern solely an individual, whereas, other-regarding action is inclusive of concerns of others. T H Green further developed the positive concept of liberty. He emphasized that an individual can determine his actions if the state plays a positive role in creating conditions under which he can exercise his moral freedom. For example; if an individual wants to help a wounded person on road, then he should be able to take the injured fearlessly to the hospital without the fear of police. Positive liberal scholars like L T Hobhouse and Harold Laski said that an individual can self-determine his actions, if the state secures the welfare of its people even if it has to limit the economic rights of the privileged few.

2.3 ISAIAH BERLIN’S TWO CONCEPTS OF LIBERTY

Published in 1958, in his work ‘Two Concepts of Liberty’, Berlin explains negative liberty as freedom from interference. It is freedom from what or whom. An individual is the best judge of his interests and he has the freedom to develop and carry out his work without any hurdle or coercion.

Positive liberty is an idea of self-mastery and rational control of life where an individual can self-determine his actions. The state has no role to play in it. It belongs to an individual's own will and the capacity to develop his own capabilities. For example; if an individual wants to improve his health, then smoking should be stopped. The state cannot do anything to force an individual to quit smoking. The individual himself should develop self-mastery or control his life so that his capacities are developed.

Berlin gives an example that if one cannot fly like an eagle or swim like a whale; one is by no means deprived of political liberty on this count. Similarly, if a man is too poor to afford something on which there is no legal ban- a loaf of bread, a journey round the world-he cannot complain that he has been deprived of political liberty.

In the moral sphere, Norman P. Barry in his 'An Introduction to Modern Political Theory' appreciated Berlin's view. He said that every individual possesses a higher self and a lower self. The former is an upholder of rational and genuine desires like being punctual, moral and clean. The latter consists of irrational desires like that for drugs, smoking, alcohol and violent behavior. So if a person is not free from his lower self, then he cannot enjoy liberty. So Berlin's view of self-mastery is basically controlling the lower self and being free. But in a material sphere, Berlin has possibly mis-understood positive liberty. Flying like an eagle or swimming like a whale has a natural limitation and the state has nothing to do with it. But if people go without food/bread then it's the duty of the state to fulfill basic necessities.

Check Your Progress Exercise 1

Note: i) Use the space given below for your answer.

ii) See the end of the unit for tips for your answer.

1) What is the concept of negative liberty propounded by Isaiah Berlin?

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2.4 NEO-LIBERAL VIEW

Neo-Liberalism also known as neo-classical liberalism was started in 1970s to revive economic liberalism. Its main proponents were Margaret Thatcher and Ronald Reagan who wanted to increase economic growth and reduce the

Liberty

fiscal deficit of the government's budget. The aim was to cut down the role of government and enhance the role of the market. Minimum government became the underlying characteristic of neo-liberalism. Free market economists such as Friedrich Hayek and US economist Milton Friedman attacked the role of the government. Robert Nozick was committed to the 'night watchman' state.

F A Hayek in his work, *Constitution of Liberty* argued that a 'man possesses liberty or freedom when he is not subjected to coercion by the arbitrary will of another'. He described that individual freedom is not political freedom, inner freedom and freedom as power. In a politically free society, people can choose their governments, can participate in legislation and have a control over administration. But this may not lead to individual freedom. A democratic government may have restrictions and an autocratic government can be relatively free. He further said that individual freedom is not inner freedom. An individual might be guided by his actions or will rather than be coerced by others. But that does not mean that the society is free to allow rational discourse of actions. Finally, individual freedom should not be confused with freedom as power. Freedom of power signifies our power to act according to our wishes and desires. An individual may have the effective power to get things done that he might not be able to do legally, but that nowhere signifies that a society is free in its actions.

According to Hayek, an individual will be able to self-determine if there exists 'freedom from constraints of the state'. He argued to minimize the coercive actions of the state as it is not an instrument of distributive justice. Liberty and equality are an anti-thesis of each other. A state cannot coerce society that has different talents and skills to be equal, as it will create further inequality. Hayek was so passionate about freedom that he even denied equal freedom for all. He asserted that 'it is better that some should be free than none and better that many should have full freedom than that all should have a limited freedom'. Therefore, the state should positively promote competition and ensure minimum income to all but not coerce the society to be equal in all respects. Milton Friedman in his work, *Capitalism and Freedom* underlined that a capitalist and competitive society can sustain conditions of freedom where an individual can self-determine his actions and thoughts. The state should only supplement the market and do work that cannot be handled by the latter or is too costly to bear the cost by the market. He too negated the concept of equality as it impinges on the liberty of individual to self-determine.

In his 1974 work titled *Anarchy, State and Utopia*, Robert Nozick stated that an individual can enjoy the liberty of self-determination only if the state performs limited functions, that of the protection of property rights. It is not the duty of the state to engage in redistributive transfers, as the inequalities that exist at the time of production should not be corrected at the time of distribution. An individual who has acquired goods through three sources,

that is, first, application of their selves- bodies, brains etc, second, through acquiring natural world resources like land, water resources or minerals and third, by applying themselves to the natural world resulting in agricultural or industrial products. On all these sources, an individual has rightful entitlement unless he voluntarily transfers to others. Nozick explains that if an individual has invented a medicine of rare disease, he can demand a price for it. But if there is only one water body in a desert, then no one should be allowed to monopolize it. Here, the state should work as a dominant protective association to secure liberty of every individual.

2.5 MARXIST CONCEPTION OF FREEDOM

The Marxist concept of freedom is different from the liberal individualist view. Marxists do not view the individual as an atomistic and isolated unit. The natural need of co-existence brings an individual into relations with others and therefore, a civil and political society comes into being. The socio economic conditions prevailing in society define the freedom to self-determine. Karl Marx says that the capitalist mode of production is an exploitative system as it deprives an individual of his freedom. He bases his theory on historical materialism saying that the economy has been the foundation of every society. He historically traces the development of society where earlier in ancient society, people were free and equal and they had access to goods to satisfy their basic needs. But as the society moved further and they acquired means of production like machinery, tools, resources, industries; a division was created. The society that came after ancient society was a feudalistic society where there were landlords who possessed lands and the landless serfs. After the feudal society, came the industrial society where the division was between the industry and capital owning bourgeoisie and the poor, wage earning proletariat. Marx says that an individual cannot enjoy freedom and self-determine his actions in feudal and capitalist society, because he does not have access to resources and feels alienated. Marx says that an individual gets alienated from his society, from family, from his environment and also from the product he makes, as he does not earn enough to buy the very same product. A capitalist sells the product at a higher rate appropriating the surplus value and giving lower wages to the proletariat. Marx says that an individual can attain freedom only if he revolts against the capitalist system of production. He gave an international call to the workers and said that ‘workers of all lands unite together; you have nothing to lose only worlds to gain’. So the fourth phase of society in which the workers will rule in politics will be the socialist phase where the exploitation will end and everyone will get according to his work. To achieve further equal and free society, workers will give away their power to create a communist society where no one will rule others and distribution of resources will be according to need.

Marx says that an individual can realize himself truly only in a communist

society. Neo-Marxists such as Herbert Marcuse in his work, *One Dimensional Man: Studies in the Ideology of Advanced Industrial Society* blamed the consumerist society for depriving individual of their real freedom. He says that the mass media creates a false desire for trivial material goods, thus, diverting them from the genuine need of freedom. He says that an individual should be made aware of alienation to realize freedom. C.B. Macpherson in his work *Democratic Theory: Essays in Retrieval* says that capitalism emphasizes more on extractive power rather than developmental power. The capitalist system focuses on what profit can be derived/extracted out of an individual, rather than how the individual develops so that he can realize his freedom and determine his course of actions. He adds that society can achieve its freedom when developmental power gets developed and extractive power becomes nil. Antonio Gramsci says that coercive structures of society like the police, the army and the judiciary have given way to hegemonic structures like civil society, schools and literature. Domination and exploitation in society happens through control of the mind where the working class identifies its interests with the ruling class. So, Gramsci says that the exploited class can attain freedom when they produce counter hegemony to the ideas of ruling class.

2.6 JOHN RAWLS' CONCEPTION OF FREEDOM

John Rawls's work, *A Theory of Justice* is a starting point for all the contemporary philosophers. His is a purely procedural theory of justice and follows a deontological approach (an approach where goal is not determined). A positive and a social liberal, he states that an individual can be free and self-determine the course of actions, if the foundation of society is based on the principles of justice. He says that to determine the principles of justice, all the individuals should be placed behind a veil of ignorance. He calls this the original position which is similar to the state of nature. This veil hides the real position of an individual in society in terms that he is not aware of his status, wealth, health, resources, education, family, support system, strength, weaknesses, qualities etc. In this situation, an individual will have some primitive idea of human psychology and economics and have a sense of justice. According to Rawls, rational negotiators will demand maximum benefits for the least advantaged. So as the veil of ignorance will be removed and individuals will move out of their original position, it may happen that a person might have exceptional qualities and he might desire to have maximum freedom to pursue his dreams and ambitions. So any rational individual will first desire maximum liberty as the first principle of justice. The second principle of justice will be equality of opportunity as everyone in society will desire to have equal access to resources and opportunities in society without any discrimination or exploitation.

The third principle of justice will be the Difference Principle. When the veil of ignorance gets removed, in case, any individual is at a disadvantaged

position in society like differently abled, poor access to education, health then the state should give protection to that individual. Differential treatment by the state is permitted for the individual to realize his freedom fully. Rawls, therefore says that freedom to self-determine can be achieved when a society follows these three universal principles of justice. Communitarians, such as Michael Sandel criticize Rawls' theory of justice on the basis that his theory is based on the capitalist system and he has considered man to be an atom. Whereas Sandel says an individual is deeply embedded in his society and he is not isolated from his community. So equality of opportunity should be the first principle of justice rather than granting maximum liberty to individuals. Michael Walzer argues against the Rawlsian universal standards of justice. Walzer gives the concept of complex equality. He says that there are different principles of justice for different social institutions. Feminists have also leveled criticisms against Rawls saying that had women been party to the social contract, they would have given first preference to the difference principle. They also say that Rawls has kept the private sphere such as the family out of the social contract and concentrated only on the public sphere.

Therefore, Rawls in his next book, *Political Liberalism* stated that his three principles of justice are applicable only for liberal societies and are not universally applicable to all societies. Also, his principles cater to public spheres and not to private spheres. Another prominent critic of Rawls Theory of Justice has been Amartya Sen. He argues that there is no absolute theory of justice. Concepts exist in relativity. Instead of focusing on ideal justice, Sen said, one should focus on removing more manifest forms of injustice. He demands an actual life that people can lead rather than an ideal life. Ronald Dworkin proposes his Auction Theory to attain a free state. He says that resources should be distributed according to envy. Every individual has to pass the envy test. Whatever resources are at the disposal of community, individuals will get it according to their desires and envy so that they can put it to use for realizing a just society. And a just society will in turn create conditions for a liberal society. But if an individual fails the envy test which means that he is not able to recognize what resources will be useful for him, in that case, the state should provide with an insurance to rectify his mistake.

2.7 AMARTYA SEN'S CONCEPT OF LIBERTY

Amartya Sen upholds the capability approach for the realization of freedom. He says that provision of social infrastructure such as education, health, employment might not lead to a free individual. He adds that fulfilling the demands of people according to their needs will also not lead to freedom. Sen asserts that an individual can truly realize his freedom if he develops his capability. He advocated a capability based approach to attain liberty for self-determination. He explains that even if a government has provided with schools, teachers and infrastructure for the education of children but still if a child is unable to read, write or count, the provision of these social capitals

will become irrelevant. For a child to realize his freedom fully, he should develop his skills and capabilities so that he can grow and develop. If the child has developed his capability and can read and write, then that child will be free to write a book, read a novel, solve puzzles, study engineering or medical stream. But if no capabilities of the child are built, then the child will be deprived of all the above freedoms.

2.8 FEMINIST CONCEPTION OF FREEDOM

Feminists state that true freedom can be realized in a society when social and economic opportunities are extended to women. They argue that women are disadvantaged because of the difference in their biology. They further state that social, economic and political role of women are not natural. It's the society that has confined the role of women to household work and men to the economic sphere.

The central themes on which feminism revolves are:

- a. Public and private divide
- b. Patriarchy
- c. Sex and Gender
- d. Equality and Difference

Feminists talk about breaking the public and private divide to grant liberty to all irrespective of biological sex. They say that politics is traditionally solely confined to public life such as political parties or government. But, even private life such as family and relationships are a political sphere. Betty Freidan remarked that 'All personal is political'. Freedom will be realized when the politics of everyday life is governed on the principles of justice and fairness. Household work and other domestic responsibilities need to be fairly distributed rather than solely burdening a woman with it. Breaking down of public and private sphere will also mean transferring of responsibilities to the state and with attendant provision of generous welfare to women and providing support in the form of crèches and nursery schools. Feminists have also attacked patriarchal society that has deprived women of their real freedom. In a male dominated society, it's the brother, father or husband who decide for women. Women cannot determine their real selves, as a man's decision is considered supreme. Feminists elaborate on the sex and gender classification. Sex is a biological difference between a male and a female whereas gender is a social construct. It means that the role of a man and a woman is defined by the society. It's the society that says that woman should take care of her family, household and her relationships. It's the society that defines that a woman should be polite, beautiful, should dress up in pink and red colors and play with dolls or the kitchen set. Simon De Bouvoir said that 'a woman is made, not born'. Whereas it's the society that also defines that men should not cry, they should be rough and tough,

should wear black and possess aggressive traits. Engendering of women and men has oppressed both the sexes. There are difference feminists who say that celebrating the difference in a woman will make her realize her freedom. They emphasize that women need not be ‘male identified’. Rather they can celebrate their different traits of being caring, warm, protective, child bearing and enjoy womanhood. Different traditions within feminism describe how women can achieve freedom. Liberal feminists focus on equal political rights and equality in the public sphere. Socialist feminists talk about removal of social and economic inequality so that freedom can be granted to women. Radical feminists emphasize abolition of family life and refusal to bear and rear children. New Feminism is inclusive of black feminism that underlines the rights of black women and lesbian feminism that talks about freedom of sexual rights.

Check Your Progress Exercise 2

Note: i) Use the space given below for your answer.

ii) See the end of the unit for tips for your answer.

1) What is Feminist conception of freedom?

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2.9 CONSERVATIVE VIEW OF LIBERTY

Conservatism basically means ‘to conserve’. Conservatives highlight that individuals can achieve liberty to self-determine if the order and discipline is maintained in society. Conservatives believe that humans are imperfect and order and discipline can be attained in society if traditions are followed, organic society is maintained, hierarchy and authority are respected, and property is protected. The importance of traditions such as values, practices and institutions amongst conservatives can be gauged from the fact that these traditions have survived the test of time and have been passed on from one generation to the next. They are the accumulated wisdoms of the past. Edmund Burke described society as a partnership between ‘those who are living, those who are dead and those who are to be born’. Traditions are also significant as they give a sense of identity, security and belongingness and generate social cohesion. On the other hand, conservatives are scared of change, as it is a journey into the unknown that can lead to instability

Liberty

and disorder in society. There has been a little change in the basic ideas of conservatism. Edmund Burke, a conservative scholar believed in change in order to conserve. He said change is the law of nature and one should accommodate change so that traditions remain sustained but the change should not create disorder in society.

An organic society is vital for conservatives. Organicism means that conservatives look upon society as an organism. An organism is always considered as a whole or a collection of parts. Each organ is dependent on one another and cannot function in isolation. For example; the brain has a function only if it is a part of a body. Brain, liver, kidneys outside body have no function. Similarly, they believe that human beings are dependent and security seeking creatures. They cannot exist outside the social groups. And they are always part of one or such groups such as family, friends, work, local community. Therefore, freedom for them is accepting social obligations and doing one's duty. For example; if parents guide a child, then they are not limiting freedom of child, rather, they are doing their duty for her development. Conservatives emphasize hierarchy and authority for the sustenance of an ordered society. They believe that society is naturally hierarchical and socially graded. Inequality is natural and equality is a myth. Just as the brain, kidney and other organs in a body perform different functions, similarly, various classes and groups in a society have different roles to play. The working class might not be able to enjoy the same benefits and living standards as their employers but the working class does not have a large responsibility of effectively running the organization, increasing profits, paying the salary of every employee, supervision and monitoring, and growth of company. The employee only has to do her designated work. Therefore, authority is important for providing leadership, maintaining discipline and guaranteeing existence of company. Authority develops from natural necessity. For example; if the sports coach is instructing a player about healthy diet, the time he should sleep, the fitness regime he should follow, and mental strength he should develop through meditation and so on. Such authority can be imposed 'from above' only and this guidance cannot arise 'from below' as the players do not possess the required knowledge and experience. Therefore, hierarchy and authority further develop an individual and he is further able to utilize this for his self-determination. For conservatives, liberty can be achieved if the property rights of an individual are protected. They believe that property is earned through merit, hard work and by those who possess talent. It has a range of psychological and social advantages. It is a source of protection, gives a sense of confidence and assurance to fall back in the times of a crisis. Therefore, property owners will respect each other's property and will work towards maintaining order and discipline in society. Disorder and instability will impact or damage their property and the owners will not want society to go astray. For conservatives, liberty as self-determination can be realized in an ordered society.

Lastly, conservatives reasons that why traditions, organicism in society, hierarchy and authority and property should be protected in society. They

say that humans are imperfect. They are psychologically limited and are dependent creatures. They lack experience and knowledge and are scared of isolation and instability. So every individual seeks protection and security in life and they get naturally drawn towards a stable and secure environment in which they are able to realize their freedom to self determine. Without stability and order in society, even the slightest freedom is taken away.

2.10 POST-MODERN CONCEPT OF LIBERTY

Post-modernists say that individuals will be able to realize freedom if they are able to reject the established system of knowledge and information and assert their own knowledge. Post-modernists believe that knowledge is partial and local. Every society has its own truth. There is no universal truth. There exists a complex power knowledge system where a certain truth is created to favor a particular section of society. The dominant sections of society do not allow a certain thought or views to come in society as it is against them. Post-modernists ask for rejection of the hierarchy of ideas and they also reject political and social hierarchies. They are anti-foundationalist in that there are no universal moral and political principles. Universality of ideas is an act of arrogance. Therefore, post-modernists say that every individual or society should create their own truth or search and establish their own truth. And that is when individuals will have the liberty to self determine. The German philosopher, Friedrich Nietzsche advocated nihilism. He rejected all moral and political principles and said the truth is fiction. He said that people create their own world and make their own values. Jean Francis Lyotard defined post-modernity as ‘an incredulity towards meta-narratives’. He said that all creeds and ideologies are to be viewed skeptically. Michael Foucault, a French philosopher, said that knowledge is power. He believed that truth is a social construct. And a powerful section of society creates their own truth to perpetuate and sustain their vested interests and rule in society. He analyzed different branches of knowledge as ‘archaeologies’ emphasizing need to have discourse and debate to excavate truths of every society. Jacques Derrida talks about deconstruction. He says that there are no fixed meanings of concepts, languages and statements. He appreciated difference. He said that every society has a different truth. And there is a need to deconstruct text so as to unravel the truth of every society. Deconstructing a text means to raise questions about the texts and expose the complications and contradictions in it which might also be unknown to the author. Richard Rorty, a US philosopher has stated that there exists no objective, transcendental standpoint from which beliefs can be judged. He believed that philosophy is nothing more than a conversation.

2.11 LET US SUM UP

Liberty is a very important principle in political philosophy. Though liberty and freedom are used interchangeably but for many freedom refers to a

Liberty

situation and liberty symbolizes a state of mind. Various scholars have defined liberty to self determine. Liberals have defined it as rational self-determination where the state intervenes to provide conditions where an individual can develop. T.H. Green says that individual can self-determine if the state provides moral freedom. The Marxists, on the other hand argue that an individual can not enjoy freedom and self-determination in a capitalist society and he needs to revolt against capitalist system of production to attain them. Amartya Sen's idea of liberty focuses on building capabilities of an individual while the feminists demand equality between male and female.

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2.13 ANSWERS TO CHECK YOUR PROGRESS EXERCISES

Check Your Progress Exercise 1

- 1) Your answer should highlight following points
 - Negative liberty is freedom from interference
 - An individual is the best judge of his interests
 - He should have the freedom to develop his interests without any coercion

Check Your Progress Exercise 2

- 1) Your answer should highlight following points
 - A society will have true freedom when women have equal opportunities, like men
 - Break public-private divide
 - Elaborate classification between sex and gender

UNIT 3: ALIENATION, OPPRESSION AND FREEDOM (IMPORTANT ISSUE : FREEDOM OF BELIEF, EXPRESSION AND DISSENT)*

- 3.0 Objectives
- 3.1 Introduction
- 3.2 Alienation and Similar Concepts
 - 3.2.1 Fetishism
 - 3.2.2 Objectification
- 3.3 Views of Various Thinkers on Alienation
- 3.4 Problems of Alienation
 - 3.4.1 Content
 - 3.4.2 Extent
 - 3.4.3 Prognosis
- 3.5 Alienation, Oppression and Freedom
- 3.6 Let Us Sum Up
- 3.7 References
- 3.8 Answers to Check Your Progress Exercises

3.0 OBJECTIVES

In this unit, you will be reading about the concept of alienation. You will understand its relationship with fetishism and objectification. It will further highlight how the concept of alienation has been understood by various thinkers like Rousseau, Hegel, Feuerbach, Marx, Eric Fromm and Marcuse. Then, the next section will be focusing on problems of alienation. Finally, in this unit we will understand the relationship between alienation, oppression and freedom. After reading this unit, you should be able to

- Explain the concept of alienation
- Differentiate between alienation, fetishism and objectification
- Understand the relationship between alienation, oppression and freedom

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3.1 INTRODUCTION

The term alienation term is originating from the Latin word *alius*, which means another. It is also translated as estrangement. A state in which a thing is separated, through its own act, from something else that used to belong to it, so that this other thing becomes self-sufficient and turns against its original owner. Alienation involves three constituent elements: a subject, an object, and the relation between them. Here, the subject could be an individual or a social group. For instance, alienation can be experienced by a person called 'A' or it can be experienced by a social group of workers in an unorganised sector of economy. The object of alienation can be another object, can be another person, can be an environment or it can be oneself. For example, person 'A' working in a pencil factory might be alienated from product of its labour, that is, a pencil. Person 'A' can also be alienated from a co-worker, person 'A' might be alienated from the environment of the factory itself and finally, person 'A' might be alienated from himself as a human being. Alienation obtains when a separation between a subject and object that properly belong together, frustrates or conflicts with that baseline connectedness or harmony. To say that they properly belong together is to suggest that the harmonious or connected relation between the subject and the object is rational, natural or good.

3.2 ALIENATION AND SIMILAR CONCEPTS

3.2.1 Fetishism

Fetishism refers here to the idea of human creations which have somehow escaped (inappropriately separated out from) human control, achieved the appearance of independence, and come to enslave and oppress their creators. Marx sometimes treats the phenomenon of fetishism as a distinguishing feature of modernity; where previous historical epochs were characterised by the rule of persons over persons, capitalist society is characterised by the rule of things over persons. 'Capital', we might say, has come to replace the feudal lord. Although Marx's description of alienation often use the language of fetishism, not at all times alienation and fetishism completely merge together to appear as same. For example, the problematic separation sometimes said to exist between modern individuals and the natural world, as the individuals think of themselves and behave as if they were isolated, or cut off, or estranged, from the natural world. Thus, in an uncontrolled manner, individuals exploit and appropriate natural world. Those actions of exploitation led to 'ecological' threats—including deforestation, pollution, and population growth. The inappropriate modern relation between humankind and nature here looks like an example of alienation—there is a problematic separation of self and other—but certain central characteristics of fetishism would appear to be missing. Most noticeably, the natural world is not a human creation which has escaped our control; not least,

because it is not a human creation. Additionally, the impact on humankind of this particular separation does not suit very comfortably the language of enslavement and oppression. Indeed, if anything, our inappropriate separation from the natural world seems to find expression in our brutally instrumental treatment of nature, rather than in nature's tyranny over us.

3.2.2 Objectification

It refers to the role of productive activity in mediating the evolving relationship between humankind and the natural world. Wherein the object of work becomes more important than the worker. Here the work done is not a free and natural choice made by the worker. In such a situation, the work is not a mode of self-realisation. The work becomes a compulsion. Marx maintains that productive activity might or might not take an alienated form. For instance, productive activity in capitalist societies, which are coerced, is typically said to take an alienated form; whereas productive activity in communist societies, which are based on choice, is typically predicted to take an unalienated or meaningful form. By equating alienation and objectification, one fails to appreciate that certain forms of alienation might have nothing at all to do with productive activity based on objectification. Many a times, sibling rivalry and strained interpersonal relationships have no connection with the work they are engaged in. It may be a result of miscommunication. In short, from the above discussion it is clear that neither fetishism nor objectification is identical with alienation. Rather than being synonymous, these concepts only partially overlap. Fetishism is just a subset in a large number of cases of alienation. And there are forms of objectification which do not involve alienation (the meaningful work in communist societies, for instance), as well as forms of alienation—outside of productive activity—with no obvious connection to objectification.

Check Your Progress Exercise 1

Note: i) Use the space given below for your answer.

ii) See the end of the unit for tips for your answer.

1) How is alienation different from fetishism and objectification?

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3.3 VIEWS OF VARIOUS THINKERS ON ALIENATION

The idea of alienation may be traced to the Christian doctrine of original sin. When the creations of God, Adam and Eve disobeyed God and ate the

Liberty

forbidden apple in the Eden garden, then the alienation from God happened. A breach was made, estrangement introduced. Those who were once friends now became separated. Similarly in Jean-Jacques Rousseau's theory of the social contract, individuals in a state of nature relinquished their natural freedom and original goodness in favour of civil freedom and acquired selfishness to enter a social state. That was the first stage of alienation of human beings from their in-born character.

For G.W.F. Hegel, the development of the absolute idea is a process of alienating or eternalizing ideas in the natural world and then de-alienating or recovering them at a higher stage. Each category develops into its contrary, which is originally contained in it. It thus enters a state of alienation, followed by reconciliation into a higher unity. This unity itself proceeds to further alienation. This process is called dialect (thesis, anti-thesis and synthesis). Nature is an alienation of the absolute idea. Each individual will be alien to social substance and also to its particular self although it is identified with the universal substance. The process of alienation and de-alienation corresponds to the process of the growth of human knowledge.

The conclusion of Ludwig Feuerbach's philosophical analysis of religious consciousness is that, in Christianity, individuals are worshipping the predicates of human nature, freed of their individual limitations and projected onto an ideal entity. For Feuerbach, however, this is no virtuously intellectual error, but is rather influenced with social, political, and psychological consequences, as this 'deity' now comes to oppress and enslave individuals. Further, the Christian God demands real world sacrifices from individuals, typically in the form of a denial or repression of their essential human needs. Religious consciousness, therefore for Feuerbach, looks to be a case of alienation. That is, there is both a problematic separation here between subject and object (individuals and their own human nature), and it takes the form of a human creation (the idea of the species embodied in God) escaping our control, achieving the appearance of independence, and coming to enslave and oppress individuals.

Karl Marx claimed that alienation is a universal phenomenon of capitalist societies, rooted in the alienation of workers from the products of their labour. In capitalism these products take the form of commodities, money and capital. For Marx, alienation can only be overcome by replacing capitalism by communism. The concept of alienation gained wide acceptance in the twentieth century, largely due to the influence of Marx's *Economic and Political Manuscripts*, which was written in 1844 and published in 1932. One of the most significant, and disturbing, features of factory production was the division of labour. In the past, that is before capitalism came into existence, there had been a social division of labour, with different people involved in different branches of production or crafts. With capitalism there arose the complete division of labour within each branch of production. This division of labour meant that workers had to dedicate themselves to

a particular set of tasks, a series of atomised activities, which realised only one or two aspects of their human powers at the expense of all the others. In this system, workers become increasingly dependent on the capitalists who own the means of production. It became impossible for workers to live independently of capitalism: to work meant to be reduced to a human machine; to be deprived of work meant living death. The fact that labour is external to the worker, does not belong to worker's essential being; that the worker, therefore, does not confirm oneself in its work, but denies itself, feels miserable and not happy, does not develop free mental and physical energy, but mortifies one's flesh and ruins one's mind. Hence the worker feels the sense of self only when he is not working; when the worker is working he does not feel the sense of self. The worker is at home when he is not working and not at home when he is working. Worker's labour, is therefore, not voluntary but forced, it is forced labour. It is, therefore, not the satisfaction of a need, but a mere means to satisfy need outside itself. Its alien character is visibly demonstrated by the fact that as soon as no physical or other compulsion exists, it is shunned like the plague.

According to Marx, there are four aspects of alienation experienced by a worker in a capitalist society. They are – (a) alienation from the product of labour, (b) alienation from the labour process, (c) alienation from fellow human beings and (d) alienation from human nature itself.

A) Alienation from the Product of Labour: The worker is alienated from the object worker produces because it is owned and disposed of by another, the capitalist. In all societies people use their creative abilities to produce objects which they use, exchange or sell. Under capitalism, however, this becomes an alienated activity because the worker cannot use the things the worker produces to keep alive or to engage in further productive activity. The worker's needs, no matter how desperate, do not give worker a licence to lay hands on what these same hands have produced, for all worker's products are the property of another. Marx argued that the alienation of the worker from what worker produces is intensified because the products of labour actually begin to dominate the labourer.

B) Alienation from the Labour Process: The second element of alienation Marx identified is a lack of control over the process of production. Workers have no say over the conditions in which they work and how the work is organised, and how it affects workers physically and mentally. This lack of control over the work process transforms worker's capacity to work creatively into its opposite, so the worker experiences 'activity as passivity, power as impotence, procreation as emasculation, the worker's own physical and mental energy, its personal life - for what is life but activity? - As an activity directed against self, which is independent of self and does not belong to self. The process of work is not only beyond the control of the workers, it is in the control of forces hostile to them because capitalists and their managers are driven to make workers work harder, faster and for longer stints.

C) Alienation from Fellow Human Beings: This alienation arises in part because of the antagonisms which inevitably arise from the class structure of society. Workers are alienated from those who exploit their labour and control the things they produce. In addition, they are connected to others through the buying and selling of the commodities workers produce. Our lives are touched by thousands of people every day, people whose labour has made our clothes, food and home. But we only know them through the objects we buy and consume. The commodities of each individual producer appear in depersonalised form, regardless of who produced them, where, or in what specific conditions. Commodity production means that everyone appropriates the produce of others, by alienating that of their own labour. Marx described how mass commodity production continually seeks to create new needs, not to develop our human powers but to exploit them for profit.

D) Alienation from Human Nature: The fourth element is worker's alienation from human nature itself. What makes us human is our ability to consciously shape the world around us. However, under capitalism our labour is coerced, forced labour. Work bears no relationship to our personal inclinations or our collective interests. The capitalist division of labour massively increased our ability to produce, but those who create the wealth are deprived of its benefits. Human beings are social beings. We have the ability to act collectively to further our interests. However, under capitalism that ability is submerged under private ownership and the class divisions it produces.

However, in the hands of the Western Marxists, the theory of alienation became intermingled with idealist theories, which explained alienation in terms of psychology rather than the organisation of society. The New Left which emerged in the late 1950s reacted against the theory and practice of Stalinism, but some of the writers associated with the New Left threw the Marxist baby out with the Stalinist bathwater. They abandoned some central aspects of Marxism, such as the central role of the economic structure in shaping the rest of society and the objective class antagonisms at the heart of capitalism. Alienation came to refer predominately to a state of mind, rather than an understanding of how social organisation affected human beings. The proletariat revolution never took place in other parts of Europe, except in the Soviet Union as orthodox Marxism ignored social psychology of labour. Eric Fromm was one of those scholars who tried to have a marriage between Marxism (Karl Marx) and Psychoanalysis (Sigmund Freud). For Fromm, in understanding behaviour, the focus had to shift from an individual to a social group. Fromm emphasised that the social psychology of members of a social group depends upon the social and economic context in which they are situated. Fromm revised Freud's understanding that the basic psychology of a person is developed at childhood when the child has not interacted with the society at large. Fromm said that the child is not directly interacting with the society, but the family is nothing but a miniature form

of society's values and visions in which it is located. Thus, from very early in life, a person's thought process is based on contextual societal values. For Eric Fromm, forms of alienation were 'chains of illusion' which can be broken within the context of a capitalist society, by shaping an alternative way of thinking.

Herbert Marcuse in his dissertation of 1922, *The German Artist-Novel*, the artist represents a form of radical subjectivity. In this work, Marcuse makes a distinction between epic poetry and the novel. Epic poetry deals with the origin and development of a people and culture while the novel does not focus on the form of life of a people and their development, but rather, on a sense of longing and striving. The novel indicates alienation from social life. The point is to show that there is a certain orientation of thought in Marcuse's 1922 dissertation that is motivated by his encounter with Marxism and will stay with him as his project becomes more philosophical. In short, the artist experiences a gap between the ideal and the real. This ability to entertain, at least theoretically, an ideal form of existence for humanity, while at the same time living in far less than ideal conditions produces a sense of alienation in the artist. This alienation becomes the catalyst for social change. Later, Marcuse argued that capitalism and industrialization pushed labourers so hard that they began to see themselves as extensions of the objects they were producing. Affluent mass technological societies, he argues, are totally controlled and manipulated. In societies based upon mass production and mass distribution, the individual worker has become merely a consumer of its commodities. Modern Capitalism has created false needs and false consciousness geared to consumption of commodities. As a result of workers being victims of consumerism, rather than looking to the workers as the revolutionary vanguard, Marcuse put his faith in an alliance between radical intellectuals and those groups not yet integrated into one-dimensional society, the socially marginalized, the substratum of the outcasts and outsiders, the exploited and persecuted of other ethnicities and other colours, the unemployed and the unemployable. These were the people whose standards of living demanded the ending of intolerable conditions and institutions and whose resistance to one-dimensional society would not be diverted by the system. Their opposition was revolutionary even if their consciousness was not. Marcuse had immense faith in Feminist movements and Students movements, emerging in Europe in 1970's, to play the role of bringing revolution and the potential to eliminate alienation in societies.

Check Your Progress Exercise 2

Note: i) Use the space given below for your answer.

ii) See the end of the unit for tips for your answer.

1) Explain the four aspects of alienation propagated by Karl Marx.

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- 2) Highlight how Herbert Marcuse developed the idea of alienation.

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3.4 PROBLEMS OF ALIENATION

3.4.1 Content

What constitutes alienation? What are the true indicators of alienation? One would need to judge, not only whether existing work is rightly characterised as alienated (as forced, frustrating self-realisation, not intended to satisfy the needs of others, and not appropriately appreciated by those others), but also, if so, whether it could be made meaningful and un-alienated without undermining the very features which made the relevant society a capitalist one. Reaching anything like a considered judgment on these empirical and quasi-empirical issues would clearly require some complicated factual assessments of, amongst other issues, the composition and functioning of human nature and the existing social world. Even, the erstwhile Soviet Union, which experimented with bringing change in society through revolution, failed to eliminate alienation experienced by workers. Therefore, we could say that even to identify the content of alienation is difficult.

3.4.2 Extent

The degree of alienation faced by people is highly contextual. First, that certain systematic forms of alienation—including alienation in work—are not a universal feature of human society; second, that at least some systematic forms of alienation—presumably including religious alienation—are widespread in pre-capitalist societies; and third, that systematic forms of alienation are greater in contemporary capitalist societies than in pre-

capitalist societies. It is extremely difficult to measure the extent onto which alienation exists in any particular context.

3.4.3 Prognosis

Marx's prediction was that communist society will be free of certain systematic forms of alienation, such as alienation in work. Marx's view about communism rests crucially on the judgement that it is the social relations of capitalist society, and not its material or technical arrangements, which are the cause of systematic forms of alienation. For instance, he holds that it is not the existence of science, technology, and industrialization, as such, which are at the root of the social and psychological ills of alienation, but rather how those factors tend to be organised and operated in a capitalist society; that is, a society based on a particular class division – in which producers can only access means of production by selling their labour power—and in which production, and much else, is driven by a remorseless search for profit. In volume one of *Capital*, Marx writes approvingly of workers who, through time and experience, had learnt to distinguish between machinery and its employment by capital, and to direct their attacks, not against the material instruments of production, but against the mode in which they are used. If this had not been his view, Marx could not have, consistently, also suggested that communist society – which, on his account, is similarly technologically advanced and industrial—could avoid this kind of alienation. This suggestion is strikingly optimistic. Marx is confident, for instance, that the considerable gulf between the gloomy results of adopting machinery in the capitalist present (where it increases the repetitiveness of tasks, narrows talents, promotes 'deskilling', and so on) and the bright promise of its adoption in the communist future (where it will liberate us from uncreative tasks, create greater wealth, develop all-round abilities, and so on) is easily bridged. However, Marx's reluctance to say very much, in any serious detail, about the future shape of socialist society – prevents him from offering any serious discussion about how precisely alienation will be reduced, if not completely removed.

Check Your Progress Exercise 3

Note: i) Use the space given below for your answer.

ii) See the end of the unit for tips for your answer.

1) Highlight the problems inherent in the concept of alienation.

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3.5 ALIENATION, OPRESSION AND FREEDOM

Separations are problematic if they disturb the harmony existing in a society, and separations are unproblematic if they facilitate, 'self-realisation'. Self-realisation being understood here as a central part of the good life, and as consisting in the development and deployment of an individual's essential human characteristics. But what constitutes an individual's essential human characteristics is highly debatable. Therefore, alienation has to locate itself beyond essential human nature. Alienation, whether it is problematic in a context or otherwise is determined by its relationship with oppression and freedom. The presence of oppression is a pre-requisite for alienation to evolve in a society. For example, the presence of oppression of common subjects by priests in pre-capitalist societies led to alienation of common people from God, its own creation. Similarly, in capitalist societies, it is the unbridled exploitation of workers by capitalists that leads to alienation of workers from the – (a) the product of labour, (b) labour process, (c) fellow human beings and (d) human nature itself. From one perspective, these two above mentioned events in the past are problematic as they ruptured the harmony, unity and belongingness between individuals. However, only through this process of alienation, the channel for self-realisation opens. Only through separation, the vision to critically engage with the existing exploitative reality comes and thus, an urge to overthrow it.

To understand the positive aspect of alienation as a stepping stone towards freedom, a look at dialectical progression involving three *historical* stages of Marx is imperative. First, pre-capitalist societies are said to embody the stage of undifferentiated unity. Here, individuals are buried in their social role and community, scarcely conceptualising, still less promoting, their own identity and interests as distinguishable from those of the wider community. Second, capitalist societies are said to embody the stage of differentiated disunity. Here, independence and separation predominate, and individuals care only for themselves, scarcely thinking of the identity and interests of the wider community. Indeed, they are typically isolated from, and indifferent or hostile towards, the latter. Third, in future, Marx predicted that communist societies will embody the stage of differentiated unity. Here, desirable versions of community and individuality flourish together. Indeed, in their new forms, communal and individual identities, and communal and individual interests, presuppose and reinforce each other. In the present context, the crucial stage is the second one. This is the stage of alienation, the stage of disunion which emerges from a simple unity before reconciliation in a higher (differentiated) unity in a communist society. This is the stage of present capitalist societies involving the problematic separation of individuals from their social role and community. In the first stage (of pre-capitalist societies) there is a problematic relation, but no separation. And in the third stage (of future communist societies) there is a separation, but it is a healthy rather than a problematic one. In this second stage of alienation, there is a loss, or lack, of something of value; roughly speaking, the loss or

lack of the individuals' attachment to their social role and community. Marx recognises that the moment of alienation, for all its negative features, also involves the emergence of a good (individuality) which, in due course (and freed from the limitations of its historical origins), will be central to human flourishing in a communist society. For example, in the colonial period, the exploitation by British imperialists reached such a stage wherein Indians internalised the inferiority of themselves, as preached by the British. It was a stage of alienation wherein most of the Indians got separated from their true-self. However, only in this alienation Mohandas Karamchand Gandhi could see the real exploitative structure of colonialism and the strength to oppose it. Gandhi firmly believed that to bring any kind of reform, even at individual level, the alienation (detachment) of the reformer from the subject of reform is necessary. If one is blind in love with the existing relationship, then the scope for reform is closed forever. This was realised by Gandhi very early in his life when he could not reform the bad habits of his childhood friend Sheikh Mehtab.

Thus, we could conclude that even though alienation is most often associated as a product of oppression, alienation also is a stepping stone towards freedom.

Check Your Progress Exercise 4

Note: i) Use the space given below for your answer.

ii) See the end of the unit for tips for your answer.

1) Explain the relationship between alienation and freedom.

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3.6 LET US SUM UP

After discussing the concept of alienation, it is clear that alienation is a reality in various historical stages of human existence. It is neither the creation of capitalist society nor will end with it. However, the degree of alienation reached its zenith under capitalism. The experience of alienation varies from one capitalist society to another. To measure alienation, to fix its content and to predict how it will be removed from the society – all are difficult questions to answer. It is also imperative here to emphasise that alienation is a complex concept beyond the binaries of positive and negative values. In spite of origin of alienation's deep connection with oppression, alienation also has a potential to realise freedom in a given society.

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3.8 ANSWERS TO CHECK YOUR PROGRESS EXERCISES

Check Your Progress Exercise 1

- 1) Your answer should highlight that fetishism is just a subset in a large of cases of alienation. And there are forms of objectification which do not involve alienation as well as forms of alienation—outside of productive activity—with no obvious connection to objectification.

Check Your Progress Exercise 2

- 1) Your answer should mention four aspects of alienation for Karl Marx
 - alienation from the product of labour
 - alienation from the labour process
 - alienation from the fellow human beings
 - alienation from the human nature itself
- 2) Your answer should bring to light - Herbert Marcuse had lost the hope that workers will rise above alienation to transform the society. For him, the role of intelligentsia and artists were crucial in bringing an end to alienation in a given society.

Check Your Progress Exercise 3

- 1) Your answer should discuss the problems inherent in the concept of alienation as that of content, extent and prognosis.

Check Your Progress Exercise 4

- 1) Your answer should highlight how alienation provides separation from the object of reform and thus gives clarity to achieve freedom.