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Does collective unfreedom matter? Individualism, power and proletarian unfreedom

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ABSTRACT

When assessing institutions and social outcomes, it matters how free society is within them ('societal freedom'). For example, does capitalism come with greater societal freedom than socialism? For such judgements, freedom theorists typically assume Individualism: societal freedom is simply the aggregate of individual freedom. However, G.A. Cohen's well-known case provides a challenge: imagine ten prisoners are individually free to leave their prison but doing so would incarcerate the remaining nine. Assume further that no one actually leaves. If we adopt Individualism plus the standard liberal view of freedom, such incarceration seems to leave societal freedom unaffected. This is an important theoretical challenge: it seems we must either reject Individualism or reject, or at least amend, the liberal view. Cohen also suggests his case, and the collective unfreedom therein, helps us capture how proletarians are unfree under capitalism. In this article, I argue that we can solve Cohen's puzzle, if we focus on how power can reduce freedom. If we adopt the republican view of freedom, we can say that prisoners are unfree in Cohen's case because they are dominated by the other prisoners. This solution keeps Individualism but moves beyond liberal freedom. I then also show how this individualistic framework captures proletarian unfreedom.

KEYWORDS Freedom; liberty; republicanism; G.A. Cohen; collective unfreedom; socialism; capitalism

Introduction

When we assess institutions or social outcomes, it matters how much freedom people enjoy under them. For example, if capitalism offers individuals more freedom than socialism, as is often claimed, then this should be an important argument in its favour. Such assessments are about how free society is overall, what I call *societal freedom*. But how do we determine societal freedom?

First, we need to say what makes individuals free and unfree. One common answer is provided by liberal theories of freedom. Second, we need an account of how societal freedom relates to individual freedom. Here, Individualism is the obvious answer: simply aggregate individual levels of

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freedom. For example, to say that capitalism gives people more freedom than socialism entails that the aggregate of individual overall freedom is greater.

However, G.A. Cohen's famous case suggests the combination of liberal freedom and Individualism runs into a challenge:

> Ten people are placed in a room, the only exit from which is a huge and heavy locked door. At various distances from each lies a single heavy key. Whoever picks up this key … and takes it to the door will find … a way to open the door and leave the room. But if he does so he alone will be able to leave it. Photoelectronic devices installed by a gaoler ensure that it will open only just enough to permit one exit. Then it will close, and no one inside the room will be able to open it again.. (Cohen, 2011a, p. 159)

Cohen further assumes that no prisoner actually leaves. On the liberal view, each prisoner seems free to leave. If we also adopt Individualism and just aggregate individual freedom, imprisonment would make no difference to the group's societal freedom. Cohen suggests that, besides individual freedom, *collective* unfreedom matters too: while each prisoner is free to leave, they are collectively unfree to leave. Each prisoner's freedom is conditional on others not exercising their freedom. Cohen's case suggests we must either jettison or modify the liberal view of freedom or we must reject Individualism. Call this the Philosophical Challenge. Answering the Philosophical Challenge has important implications for what individual freedom is and how we can invoke freedom in normative arguments in political philosophy.

Cohen himself also thought his example matters for debates around capitalism. Proponents sometimes argue that everyone is free under capitalism, because each proletarian is free to move up and leave the proletariat. Cohen responds that even if individual proletarians are free to move up individually, the proletariat class is not free to move up collectively (Cohen, 1981, 2011a). If we ignore that proletarians cannot exercise their freedom together, we would falsely judge that the proletarians enjoy the same freedom as the bourgeoisie. Call this the Political Challenge.

In this article, I solve the above challenges. I first present several arguments for why we should keep Individualism. Next, I argue that we can meet the Philosophical Challenge and keep Individualism, if we go beyond liberal option-freedom and draw on republican theories of freedom. Zooming in on power relations, we can then say that each prisoner is unfree, and societal freedom reduced, because prisoners hold dominating power over each other. I then show how this framework also meets the Political Challenge: without invoking collective unfreedom or giving up Individualism, republicanism captures how proletarians are unfree in ways the bourgeoisie are not, even if individual proletarians are free to leave their class.

I proceed as follows. First, I spell out Cohen's challenge. Second, I present arguments for Individualism. Third, I present my own solution to the

Philosophical Challenge and show where it has advantages over existing attempts. Fourth, I provide a solution to the Political Challenge and then conclude.

Individualism and collective unfreedom

Liberal theories feature an account of *specific freedom* and/or unfreedom. An example of a specific freedom is your freedom to eat a croissant for breakfast. Liberal theories come in two varieties. On some liberal views of freedom, one is free to φ, if and only if one is not subject to interpersonal constraints with respect to φ. Interpersonal constraints are constraints imposed by other persons. Other liberal theorists hold that beyond the absence of interpersonal constraints, being free to φ also implies having the actual capacity to φ, including the necessary physical abilities and external resources and opportunities.[1]

Next, liberal theories typically include a method of aggregating a person's specific freedoms (and sometimes unfreedoms) into a measure of her *overall freedom*. Philosophers and economists engage in sophisticated debates about how to do that exactly, which we can mostly leave aside here (except for two questions discussed below).[2] With an account of individual overall freedom – whichever is correct – we can next gauge societal freedom.

> *Individualism about Societal Freedom ('Individualism')*: gauging how much societal freedom there is within a set of individuals *G* – where *G* could be a group, class or collective of individuals, or a whole society – is equivalent to aggregating the individual overall freedom of each member of *G*.

Individual freedom can be aggregated in different ways. For example, we might simply add up all individual levels. Or we devise more sophisticated aggregation methods that include egalitarian or prioritarian weightings (Carter, 1999, Chapter 3). Which aggregation method is best does not matter for my arguments below. While Individualism is rarely discussed, it enjoys widespread acceptance. Most freedom theorists – including Herbert Spencer, John Rawls, Philippe van Parijs – are implicitly committed to Individualism by virtue of the principles they endorse for the distribution of freedom between persons.[3]

Return now to Cohen's case and consider two variations:

> *Prison*: each prisoner can leave the cell thereby enclosing the others in the cell forever. No prisoner leaves the cell.

> *Prison**: each prisoner can leave the cell without thereby enclosing the others in the cell. Everyone can leave sequentially.

Because each prisoner can leave in both Prison and Prison*, liberal theories judge that each prisoner has the specific freedom to leave.[4] Accordingly, it

seems each prisoner would be judged to have roughly equal overall freedom in both Prison and Prison*. If we now aggregate these levels into societal freedom, societal freedom would also be roughly equal in Prison and Prison*. Therefore, liberal freedom plus Individualism seems to generate a counterintuitive ranking of Prison and Prison*.

To solve this puzzle, we could reject Individualism. What is problematic about Prison, one might say, is that prisoners are collectively unfree. Accordingly, beyond just individual freedom, collective freedom and unfreedom too should influence how much societal freedom there is.[5] Alternatively, we could jettison the liberal view (or modify it) in lieu of a view that captures when freedom is problematically conditional on other people.

So, our first challenge is:

> *The Philosophical Challenge*: a plausible theory of societal freedom should (i) yield the judgement that there is more societal freedom in Prison* than in Prison, (ii) yield intuitively plausible judgements in relevantly similar cases, and (iii) provide plausible explanations/justifications for these judgements.

Condition (ii) and (iii) are meant to ensure that the judgement in (i) is not just ad hoc but based on good reasons providing plausible judgements in similar contexts.

As mentioned above, Cohen thinks collective unfreedom does important normative and conceptual work in capturing proletarian unfreedom under capitalism: ' … although most proletarians are free to escape the proletariat, and, indeed, even if everyone is, the proletariat is collectively unfree, an imprisoned class' (Cohen, 2011a, p. 162). Even if proletarians are free to move up individually, they are still unfree as a class compared with the bourgeoisie, because they cannot move up collectively. Call this:

> *The Political Challenge*: a plausible theory of societal freedom should be able to model that proletarians are more unfree, or less free, than the bourgeoisie in capitalism, even if individual proletarians can in principle move upwards and leave their class.

Of course, one might simply reject Marxist claims about capitalism. But I here simply assume that a plausible theory should meet the Political Challenge, whether empirically accurate or not.

Note that, even though this article tackles 'Cohen's Challenge', I do not argue for or against Cohen. Rather, his example provides a fundamental challenge to how we conceptualise freedom and use it in normative arguments, a challenge that matters beyond Cohen's own intentions and conclusions.[6]

To meet the Philosophical Challenge, we must either jettison or modify liberal freedom or reject Individualism. I first argue that we should keep Individualism.

Why we should keep individualism

Individualism is typically assumed, or implied, without a proper defence. I now provide such a defence.

First, Individualism is simpler than non-individualist alternatives. While not decisive, simplicity is an advantage.

Second, our reasons for valuing individual freedom speak for Individualism. Primarily, freedom is valuable, because it is valuable *for individuals*. Consider two examples. One popular reason to value freedom is respect: personal freedom can facilitate social relations in which due respect is paid to individuals and their respective conceptions of the good. Another popular reason is that freedom lets people pursue their own conceptions of the good and helps them fulfil preferences across time when their preferences, tastes and interests change (Carter, 1999, Chapter 5; Schmidt, 2017). Ultimately, freedom is valuable for individuals, which suggests societal freedom should also be about how much freedom is enjoyed by individual rather than collective agents.[7]

Second, the above argument becomes even stronger in a liberal context.[8] To put it somewhat simplistically, unlike communitarian or communist theorists, liberals insist on keeping a check on the power of a state or community to interfere with individuals. Liberals champion personal rights and institutional safeguards that limit the community's or the state's power over individuals. Berlin famously warned of proponents of positive freedom switching from individual to collective freedom, a switch that could be used to justify limiting a person's freedom in the name of her 'real freedom'. To nip such anti-liberal tendencies in the bud, Berlin suggests sticking with individual negative freedom (Berlin, 1969, pp. 131–133). This emphasis on individual freedom, of course, does not logically imply Individualism. But it suggests we should resist rejecting Individualism too swiftly.[9]

Finally, rejecting Individualism triggers what I call the Selection Problem: which irreducibly collective freedoms and unfreedoms should we include, and which ones exclude from our measure of societal freedom? A single person might be a member of a social class, a religious community, a community of Hip Hop aficionados and so on. Additionally, she technically belongs to many other possible collectives – everyone who shares her surname for example, – without feeling any meaningful affiliation. Which affiliations matter when we gauge societal freedom? Theorists who accept Individualism have a straightforward answer to the Selection Problem. They acknowledge that being able to act jointly or collectively often matters for individual freedom: Tim's freedom to dance as part of his ice-skating formation group depends on others joining the formation. Even though formation ice skating is an inherently corporate freedom, his freedom to partake is covered by his extent of individual overall freedom. Individualism thus

gives us a clear criterion: collective freedoms enter our measure of societal freedom, only when they figure as freedoms for individuals too. Rejecting Individualism would require a different criterion. Given the multifarious affiliations people have, it is hard to see where such a criterion would come from.

This concludes the first step of my argument: we should keep Individualism. To meet the Philosophical Challenge, our other option is to reject – or at least modify or supplement – the liberal view of individual freedom. I defend this option now.

The philosophical challenge

Republicanism

To meet the Philosophical Challenge – and thus to explain why prisoners are less free in Prison than in Prison* – I suggest drawing on republican theories of freedom. This is my proposed solution:

(A) Other things being equal, if a person is subject to dominating power, she has less freedom than she otherwise would have.
(B) Prisoners are subject to dominating power in Prison but not in Prison*.[10]
(C) Therefore, prisoners have less individual freedom in Prison than in Prison*.
(D) (Individualism about Societal Freedom.)
(E) Therefore, there is less societal freedom in Prison than in Prison*.

Conclusion E thus gives us the answer to the Philosophical Challenge. Let me spell out this argument in more detail.

First, we need a theory to substantiate premise A. Following Philip Pettit, distinguish two families of theories of freedom. Theories of liberal freedom focus on a person's options, on her freedoms and unfreedoms (Pettit, 2003, 2007b). Other theories hold that, while necessary, an exclusive focus on options is insufficient. A person's *status freedom* – her status as a free person – also depends on the social relations she finds herself in, particularly the *power* other agents might hold over her (Pettit, 2007b). I call such theories:

> *Power-Inclusive Theories of Freedom* (PI Theories): a theory is a PI Theory, if and only if the theory holds that a person's status freedom is a non-contingent function of, among other things, the range and kind of power others hold over her.

Most PI Theories build on liberal theories acknowledging that having options is central to freedom but add that freedom also requires having those options independently of other people's wills. We can invoke modality to bring this

out (Pettit, 2014, Chapter 2). If I have a set of freedoms *S*, then I have *S* not only in the actual world but across a specified set of nearby possible worlds in which other agents change their wills over whether I should have *S* or not. For example, consider a slave whose master is 'very nice' and lets the slave have *S*. The slave is not a free person, because her having *S* is dependent on her master's will. In nearby possible worlds in which the master does not want his slave to have *S*, the slave does not have *S*.

Republicanism is the most prominent PI Theory and has recently seen a remarkable revival.[11] Within contemporary republicanism, Pettit's theory is likely the most influential. According to Pettit, status freedom is about being free from domination, which requires the absence of *uncontrolled power* or *unchecked power* or *arbitrary power* or *alien control* – all of which mean the same thing. According to Pettit, 'someone, A, will be dominated in a certain choice by another agent or agency, B, to the extent that B has a power of interfering in the choice that is not itself controlled by A.' (Pettit, 2012, p. 50) Note a difference between liberal and republican theories.[12] On Pettit's conception, the mere uncontrolled *power* to interfere as such can render someone unfree, even if the dominator is not at all disposed to exercise such power. Not so for liberal freedom. I am not unfree in the liberal sense, if someone has the uncontrolled power to interfere with my choice but would never exercise such power, as in Prison for example.

Instead of Pettit's, other PI Theories could also substantiate premise A. Republicans in the Franco-German tradition, chief of which Kant and Rousseau, also think that being dependent on the will of another person is anathema to freedom.[13] While the specifics of such theories can differ substantially from contemporary republicanism, they are also committed to preventing power relations that allow some actors to impose their will on others. Henceforth, I rely on Pettit's account to flesh out my argument. But my main arguments mostly apply, mutatis mutandis, to other PI Theories too.

Note that freedom as non-domination comes in degrees (Pettit, 1997, pp. 74–77). How free I am is determined by how many options I have and how important they are (*extent*) and by how strongly my options are dominated or non-dominated (*intensity*). The intensity of someone's dominating/non-dominating power over me in turn is a function of

(i) how many and which options are subject to her power to interfere with me,
(ii) how effectively can she dominate me,
(iii) and how far her power is controlled/uncontrolled.

Let me spell out (iii): how can someone's power over me be controlled? I can hold control in different ways. First, when I have *preventive* control, I can prevent someone's interference before they exercise their power. Second,

when I hold abortive control, I can stop someone's interference once that interference is already ongoing. Third, when I hold responsive control, I can visit consequences on someone after they have interfered with me (like fines or punishments). Fourth, I can either hold power myself (direct control) or someone else might hold power on my behalf (indirect control). Consider an example. My friend has the power to pay me a visit. But her power is not dominating. If I don't want her to visit me, I can close the door to prevent her from coming in (preventive control). I can make her leave, if she overstays her welcome (abortive control). And should she enter my property against my will, say when I am holiday, the police and legal system can visit consequences upon her afterwards (indirect responsive control). Note also how such controlled power facilitates consensual ways of interacting and relating with others: the control I have over my friend's power to visit provides good social conditions for consensual interactions between us.[14]

Return now to collective unfreedom. Premise B stated that prisoners are dominated in Prison but not in Prison*. In Prison, my having basic freedoms depends on others not leaving the cell. In this sense, they hold strong power over me: they can take away all my freedoms by simply going through the door. On a republican model, such power threatens my status as a free person even if, as we assume, other prisoners do not exercise it. For my basic freedoms are made problematically conditional. In my basic freedoms, I depend on the will of others. Compared with liberal theories, republican freedom here brings out a separate freedom-based complaint.[15]

I said above that freedom as non-domination comes in degrees. So, how much domination, and thus unfreedom, is there in Prison? Note, first, that while dominated, prisoners are not maximally unfree. In terms of extent, I still have some option-freedom, because I can leave.[16] In terms of *intensity*, I am not perfectly dominated either. Even though other prisoners can take away all my basic freedoms, and can do so rather easily, I still hold some preventive control: I could leave myself and thereby remove other prisoner's dominating power over me.

However, while not maximally unfree, prisoners in Prison are still unfree. To start, prisoners have no abortive or responsive control, which is a problem given how strong other people's power is over them. Once someone else has left prison, I lose all power to control the ensuing constraints on my life. I can neither abort the constraints nor visit consequences upon those who have constrained me. Moreover, while I do hold some preventive control, such control does not suffice to remove domination, for at least two reasons.

First, to prevent others from exercising power, I would have to bring about a very bad outcome, namely incarcerate the other prisoners forever. If exercising control over someone else's power requires doing something so 'morally costly', my control is greatly reduced. Consider an analogy. Imagine Joe keeps humiliating Maria in public. Maria has no way to control Joe's

power to humiliate her other than shooting him with a gun (something she would get away with). Quite clearly, Maria's control is far from perfect, because it involves doing something morally undesirable. Moreover, Maria's preventive control does not facilitate consensual exercises of Joe's power. It would be absurd to interpret Maria's not killing Joe as implicit consent to his bullying.[17]

Second, it is not a good republican set-up, if my preventing domination would itself require exercising domination.

Therefore, my analysis in terms of control yields the intuitive verdict that, while not 'maximally' unfree', prisoners in Prison are unfree in virtue of the dominating power other prisoners have over them.

I have argued that republicanism solves the Philosophical Challenge. Going beyond standard liberal freedom makes sense of Prison and allows us to keep Individualism. Let me now show how this solution improves on other individualist solutions.

Compossibility

An alternative to republicanism is the Compossibility Response. Two persons have the compossible freedom to φ, only if one person's φ-ing does not take away the other person's freedom to φ.[18] For freedoms to be compossible in a group, each group member needs to be able to exercise those freedoms even when everyone else is exercising them (or, on a weaker notion, a certain proportion or number of others). The Compossibility Response would hold that being free to φ implies that φ-ing is compossible.[19] It can then say that prisoners in Prison* have more freedom than those in Prison, because in Prison* their freedom to leave is socially compossible. I can leave, even if the others leave too. By building the conditionality of individual freedom into individual freedom itself, the Compossibility Response can make sense of Prison and keep Individualism.

However, the Compossibility Response runs into trouble. Responding to Cohen, John Gray provides the following *reductio*:

> *Telephone*: 'We do not usually suppose that, unless any subscriber to a telephone system can use it at the same time as every other or most other subscribers, then the entire class of telephone users is rendered unfree by the system.' (Gray, 1988, p. 91)

The Compossibility Response overgenerates unfreedoms.

Republicanism, in contrast, does not overgenerate, because it does not judge that incompossibility always generates unfreedom. Remember that republican freedom is a function of intensity and extent. On both intensity and extent, Telephone is not troubling. Consider intensity first. Other subscribers hold only very weak power over me. Only when others act

collectively is my freedom to make a phone call taken away. And, typically, the other telephone subscribers do not coordinate well as a collective agent to exercise any such power. Therefore, other people's power over my freedom to make a phone call is extremely limited. Consider extent next. Republicans do not advocate abolishing or minimizing all social power, but to secure – or even maximize – the range of non-dominated options (Pettit, 1997, pp. 97–109). Social connectedness and conditionality can increase such options. The freedom to make phone calls expands people's extent of republican freedom by extending their range of non-dominated options. Therefore, although there is incompossibility in Telephone, there is no republican unfreedom.

At the same time, republicanism marks *some* cases of incompossibility as sources of unfreedom, namely when incompossibility leads to domination. In Prison, prisoners' freedoms are not compossible. This incompossibility results in dominating power: each prisoner can exercise strong power over all the others by leaving.

Kramer

I have argued that republicanism meets the Philosophical Challenge, whereas liberal freedom does not. But I have not yet considered the liberal response given by Matthew Kramer. Kramer would argue that his liberal theory of overall freedom does meet the Philosophical Challenge (Kramer, 2003, pp. 224–240). Kramer's response builds on two features of his freedom measure.

First, following Ian Carter, Kramer holds that to measure overall individual freedom, we should aggregate sets of freedoms an individual can exercise together, i.e. freedoms (and unfreedoms) that are conjunctively exercisable. For example, if a gunman says 'your money or your life', he reduces you overall freedom. Because, while you retain the specific freedom to keep your money, you have lost the set of conjunctively exercisable freedoms to keep your money *and* your life (Carter, 1999, Chapter 7).

Now, imagine you are being moved from Prison* to Prison. How much would your level of overall freedom change? On the one hand, you lose the set freedom-to-leave-prison-without-entrapping-others.[20] But, conversely, you also *gain* the freedom-to-leave-prison-and-entrap-others. So, there is both a *ceteris paribus* increase and a *ceteris paribus* decrease in overall freedom (Kramer, 2003, pp. 224–240). Does one effect outweigh the other?

This is where a second feature of Kramer's measure comes in. Kramer defends a Hybrid View of overall freedom: a person's overall freedom is a function of both the quantity of her sets of freedoms (and unfreedoms) as well as their *quality* (Kramer, 2003). Kramer argues that on his Hybrid View, the freedom-to-leave-*without*-entrapping-others is more valuable than the freedom-to-leave-by-entrapping-others. For it is valuable to be able to exercise

one's freedoms without becoming responsible for making others drastically worse off or causing something bad. Therefore, you have less individual overall freedom in Prison than in Prison*, because you can only exercise your freedoms by doing something morally undesirable. When we now aggregate individual freedom levels, societal freedom is lower in Prison than in Prison*. And Kramer can say as much without rejecting Individualism.[21]

Kramer's response only works, if we grant the above assumptions about freedom-measurement.[22] But even granting those assumptions, Kramer only gives us part of a convincing response. I earlier stipulated that to meet the Philosophical Challenge, a theory (i) should yield an intuitive judgement in Prison and Prison* but (ii) also do so in relevantly similar situations along with (iii) plausible justifications of such judgements. Kramer gives us (i) but does not fully satisfy (ii) and (iii).

The reason is that two types of *conditionality* matter in Prison. First, other people's basic freedoms are conditional on what I do. My leaving would remove most of their freedoms. Kramer's analysis brings out this conditionality. But a second type of conditionality matters too: *my* basic freedoms depend on what others do. Their leaving will remove *my* freedoms. What is troubling in Prison is how precariously my basic freedoms depend on other people's wills. To isolate this second sense of conditionality, consider:

> *Just Sentence*: ten prisoners are in prison, nine of which are convicted felons. You are the tenth prisoner but, unlike the others, you are an innocent upright citizen. Each prisoner can leave the cell. But upon leaving, all remaining nine in the cell will be imprisoned for exactly the amount of time they have been justly sentenced to. Except for you, you will be imprisoned for the rest of your life. You must first wait two hours to see if no one else leaves. After that you are free to leave. None of the prisoners leave the cell.

In Just Sentence, your leaving will incarcerate the other inmates. But unlike in Prison, this is, *ex hypothesi*, not a moral burden. Your leaving is not morally problematic. If anything, it might contribute something valuable (justice, desert etc.). Accordingly, your freedom-to-leave-while-entrapping-others is not less valuable than your freedom-to-leave-without-entrapping-others. Therefore, Kramer's analysis above does not apply. However, while you wait for two hours, your basic freedoms are wholly dependent on the will of the other prisoners. This conditionality on *other* people escapes Kramer's analysis. My earlier republican analysis, in contrast, captures this will dependence, both in Just Sentence and in Prison.[23]

The political challenge

I have drawn on republicanism to show that we can keep Individualism and still meet the Philosophical Challenge. While this article's focus is on the

Philosophical Challenge, let me still address the Political Challenge which I defined as:

> *The Political Challenge*: a plausible theory of societal freedom should be able to model that proletarians are more unfree, or less free, than the bourgeoisie in capitalism, even if individual proletarians can in principle move upwards and leave their class.

Note first that we cannot simply apply the above answer to the Philosophical Challenge to solve the Political Challenge.

Consider first how Kramer's argument does not meet the Political Challenge. Kramer's account judged people to have less freedom in Prison than in Prison*, because if they wanted to exercise their freedom, they would have to incarcerate the remaining inmates. However, individual proletarians are unlikely to face any such choice: by leaving the proletariat, an individual typically does not take away all other proletarians' freedoms.

Second, my republican analysis was that prisoners in Prison are unfree, because they depended on the dominating power of other prisoners. However, this analysis does not satisfactorily address the Political Challenge either. Ex hypothesi, proletarians under capitalism seem more dominated by capitalists than other proletarians.[24]

However, drawing on both liberal and republican arguments, I now show that an individualist framework does meet the Political Challenge. But I do so through an analysis somewhat different from that required for the Philosophical Challenge.

Liberal freedom

Ian Carter argues that the proletariat is less free than the bourgeoisie in the liberal sense – even if they can move up – simply because individual proletarians have less individual overall freedom (Carter, 1999, pp. 253–255). Two features of Carter's freedom measure facilitate this response.

First, Carter's measure of overall freedom aggregates sets of conjunctively exercisable freedoms, that is, freedoms one can exercise together (Carter, 1999, Chapter 7). Carter contends that individual proletarians have far fewer conjunctively exercisable freedoms. Typically, a proletarian must work much harder to leave her class and put up with more austerity than a member of the bourgeoisie trying to remain bourgeois. I would add that some proletarians will also have to take on more debt to move up, say to go to university, buy a house, or start a business. Carter's measure will reflect this difference, because the necessity of hard work, austerity, and indebtedness means proletarians have fewer sets of conjunctively exercisable freedoms.

Second, Carter's measure of overall freedom uses probabilistic qualifications for sets of freedoms. Other things being equal, the more likely you are to

have certain future sets of freedoms, the freer you are. Such probabilities help reflect proletarian unfreedom. For proletarians are typically *less likely* to succeed at becoming bourgeois than bourgeois people are at staying put (Carter, 1999, pp. 254–255).[25]

Carter shows we can capture a lot of proletarian unfreedom by just focusing on how much less freedom individual proletarians have.[26]

Carter thinks overall freedom depends only the *quantity* of one's freedoms and unfreedoms, not their *quality*. As mentioned earlier, Kramer disagrees and accepts the Hybrid View, where both quantity and quality matter. Although Kramer does not make this argument, we could add that the option to leave one's class and join the bourgeoisie is not qualitatively the same as the option to remain bourgeois. As Jennifer Morton describes in *Moving Up Without Losing Your Way*, upwardly mobile people often face tough emotional challenges and, what she calls, 'ethical costs', such as a disconnect from one's original community, feeling complicit in an unjust system, and many others (Morton, 2019). On a Hybrid View, this disvalue of 'leaving your class' would be reflected in the proletarian's lower level of overall freedom.

Republican freedom

Republicanism meets the Political Challenge. First, it does so by extension. Republicans can simply include the liberal responses discussed above. Remember that liberal option-freedom is one determinant – but not the only one – of republican freedom. Accordingly, because proletarians have less option-freedom, as shown above, they are also less free in the republican sense.

But republicanism also adds its own perspective. First off, a very rich literature on 'radical republicanism' has recently emerged. Seeking inspiration from Marx and 19th labour republicans, several republicans argue that proletarians are necessarily dominated under capitalism.[27] Very roughly, under capitalism, proletarians are forced to sell their labour to capitalists whose power is not under popular control. Only through cooperative or public control over the economy – by democratising the economy – could proletarians escape domination. However, not all republicans agree on these points. While some think republicanism implies socialism, others view market economies as compatible with republican freedom, provided suitable welfare state measures, labour market regulation, and so on are in place (Pettit, 2006, 2007a). I here lack space to resolve those issues and to engage with the rich debate on radical republicanism in detail. But doing so is not necessary here. I think republicans across these strands have enough common ground to point out how proletarians are unfree in ways the bourgeoisie and capitalists are not. Most importantly, they are subject to their employer's dominating power (Anderson, 2017; Pettit, 2014, p. 105). Particularly in Marx's day,

factory owners would reign over their workers like miniature autocrats. And even in today's rich countries, private companies often have far-reaching power over their employees' lives (Anderson, 2017).

In any case, I here respond only to the narrower Political Challenge: even if they individually have the freedom to move up, proletarians are less free than the bourgeoise. And republicanism helps us capture this specific phenomenon in the following two ways.

First, proletarians are more dominated with respect to their freedom to move up. A bourgeois person already has important economic and social resources, such as income, wealth and status. Accordingly, her resultant freedoms are typically more robust and less dependent on the goodwill of others than the proletarian's, who must still work her way up to get those resources, oftentimes also incurring significant financial debt to get there.

A second, more complex answer focusses on the dependencies proletarians encounter when they try to move up. Many proponents of laissez-faire capitalism – those Cohen presumably tries to disprove – argue that meritocracy ensures proletarians are free to move up. For example, whatever your social background, if you work hard, there is a clear path upwards for you. Now, I here leave aside whether meritocracy really is a suitable way to extend people's freedoms. But even if it is, the argument fails. Because laissez-faire capitalism is likely not meritocratic enough – and not enforceably so – it will create problematic dependencies for proletarians who seek to move up. My argument moves in three steps.

First, contrary to some people's intuitions, countries with stark economic inequalities typically have lower social mobility than more equal countries (Wilkinson & Pickett, 2010, Chapter 12). You are more likely to live the American dream in Denmark than the USA, as some people put it. And capitalist societies, as Marx described them, come with high inequality and low social mobility.[28]

Second, we assume, plausibly, that low social mobility indicates weak meritocratic mechanisms. By 'meritocratic mechanisms' I mean social mechanisms that control 'distributors' – those who distribute goods and positions or can grant access to them – such that their distributive decisions are forced to conform to meritocratic principles. I understand 'meritocratic principles' as principles that match access to a certain good or position to a set of meritocratic criteria, such as ability, effort or achievement. Not just any criterion can be in that set. The criteria need to somehow relate to merit. Importantly, socioeconomic status should not be among them.

Third, meritocratic mechanisms control the distributors' power such that in their distributive decisions they must track the merit-related interests – and their concomitant meritocratic claims – of those trying to move up. Meritocratic mechanisms require control over distributors and not just mere behavioural regularities that fortuitously coincide with meritocratic principles. Now, highly unequal capitalist societies typically come with power structures that lack

adequate control over distributors. In such societies, economic and political power is highly biased towards – or even captured by – those owning capital. Meritocratic mechanisms are thus typically weak as the distributors' power is not sufficiently controlled towards meritocratic principles.

Therefore, in her attempt to move up, a proletarian will strongly depend on the inadequately controlled power of distributors. For example, say a meritocratic principle would require that a proletarian's good grades and hard work should guarantee her a place at an outstanding university, her decent grades guarantee her a spot at a decent university and so on. But being relatively unconstrained by meritocratic mechanisms, universities and their admission officers might prefer to focus more on the social background of students or on whether they will fit in, are 'legacy students', or can afford tuition. Or such distributors might rely a lot on gut feelings in making such decisions. Given the lack of a strong meritocratic mechanism, our proletarian depends on the university's will. They might accept her or they might not. Further, assume next that the proletarian lacks the necessary funds. She can then either depend on the relatively uncontrolled power of private scholarship foundations or, where possible, incur high student debt (which, as (Gourevitch, 2012) argues, constrains her future freedom). And even after completing her university education, our proletarian will again be subject to employers who are relatively uncontrolled in their hiring practice. Meritocracy here will be a matter of luck. All the while, our proletarian might in some sense be free to move up. But in her attempt to do so, she will be subject to the inadequately controlled power of those who control access to goods and positions.

Conclusions

Does capitalism come with greater societal freedom than socialism or is it the other way around? Such questions are about societal freedom. Individualism equates societal freedom with the aggregate of individual freedom. But Cohen's famous collective unfreedom case presents a challenge: either we reject Individualism or reject (or supplement) the liberal view of individual freedom. I presented arguments for the latter option. I defended the following propositions.

First, we should keep Individualism. Second, we can solve Cohen's Philosophical Challenge by focussing on how power can reduce freedom. Adopting the republican view of freedom, for example, we can say prisoners are unfree in Cohen's case, because they are dominated by the other prisoners. This account makes sense of collective unfreedom cases without giving up Individualism and, as I argued, does better than other individualist responses. Third, this individualist republican framework captures how proletarians are unfree in ways the bourgeoisie are not, even if proletarians are individually free to move up.

Notes

1. See (Berlin, 1969; Carter, 1999; Kristjánsson, 1996; Miller, 1983; Steiner, 1994) for examples of the first type of view and (Cohen, 2011b, pp. 196–197; Kramer, 2003; Parijs, 1997, pp. 20–24; Schmidt, 2016; Sen, 1985, 1988, 1991, 1999) for the second type. Kramer's view, as well as my own, are trivalent: Freedom and ability are equivalent. But it is not the case that inability (and lack of freedom) implies unfreedom. One can be 'merely unable but not unfree'.
2. See (Carter, 1999; Hees, 2012; Kramer, 2003; Steiner, 1983; Sudgen, 1998) for work in philosophy and (Arrow, 1995; Bossert, 1997; Bossert et al., 1994; Hees, 1998, 2004; Klemisch-Ahlert, 1993; Nehring & Puppe, 1999; Pattanaik & Xu, 1990, 1998, 2000; Puppe, 1996; Sen, 1985, 1991) for work in economics.
3. The following theorists either endorse Individualism directly or endorse distributive principles that imply Individualism (Carter, 1999, Chapters 3, 9.1–9.4; Kramer, 2003, pp. 226–240; Norman, 1987; Parijs, 1997, p. 25; Rawls, 1971, Chapter IV; Schmidt, 2016, pp. 190–196; Spencer, 1873, p. 35; Steiner, 1994).
4. Cohen elsewhere argues – independently – that freedom implies an actual capacity to do something (Cohen, 2011b, pp. 193–195). But his case works for both a capacity and a purely negative view (Cohen, 2011b, pp. 193–95).
5. Hindriks argues we should only ascribe freedom or unfreedom to collectives that are corporate agents with decision-making capacities. In Cohen's case, there is a mere collective without agency (Hindriks, 2008). I leave this conceptual response aside here. I am here focussed on collective freedom in Cohen's sense, where the collective lacks irreducible collective agency.
6. For example, the Political Challenge does not capture all of Cohen's own normative concerns which go beyond freedom. In one place, he also responds to the argument that proletarians are responsible for their economic status, because they could each join the (petit) bourgeoisie by working hard. Cohen responds that, because they are collectively unfree, proletarian complaints endure, particularly in light of values such as solidarity (Cohen, 2011a, pp. 159–162).
7. Some argue that collective agents can be 'autonomous' (Hindriks, 2014). But I do not think this implies freedom is valuable for autonomous collective agents: first 'autonomy' might not mean the same for both collective and individual agents and, secondly, collectives can be agents without being persons with moral standing (Hess, 2013).
8. Such liberal arguments should matter for Cohen. He does not mean for his argument to depend on a specifically 'socialist' or moralised notion of freedom. Rather, he argues that socialism grants people more *liberal* freedom than capitalism (Cohen, 2011a, p. 155).
9. One might respond that rejecting Individualism is compatible with normative individualism, because collective unfreedom can negatively affect individuals. For example, individual proletarians might be unhappy, when they leave their class behind. However, such a response changes the subject. Individualism is about freedom only and excludes other values such as psychological wellbeing.
10. Moreover, we assume things are otherwise equal or prisoners do not otherwise have more freedom in Prison* than in Prison.
11. See, for example, (Laborde & Maynor, 2009; Lovett, 2010; Pettit, 1997, 2012, 2014; Skinner, 2012).

12. Republicans and liberals engage in quite a tussle over who boasts the better theory of freedom (Bruin, 2009; Carter, 2009; Dowding, 2011; Kolodny, 2019; Kramer, 2009; Lang, 2012; Larmore, 2003; Maynor, 2003; McMahon, 2005; Pettit, 2011, 2014; Shnayderman, 2012; Simpson, 2017; Talisse, 2014). I do not argue that republicanism is the better theory all things considered. I only provide one argument which, by itself, is not decisive. Moreover, by including other PI Theories, my argument applies to views that do not fall so neatly onto either side of the liberal-republican divide.
13. See (Hodgson, 2010; Kant, 1996; Neuhouser, 1993; Pettit, 2013; Ripstein, 2010; Rostbøll, 2016; Rousseau, 1754, 1762). List and Valentini have recently suggested another 'non-republican' PI view that combines power and freedom (List & Valentini, 2016).
14. See (Schmidt, 2018) for more.
15. According to Pettit, domination implies my freedoms depend on other people's preferences over whether I should have those freedoms or not. I am not dominated, however, when my freedoms depend on several other people's orthogonal preferences (Pettit, 2014, pp. 49–50). I am somewhat sceptical that this distinction perfectly tracks domination. But even if it does, my analysis of Prison still holds: my freedoms depend on *both*, other prisoners' preferences over orthogonal matters and their preferences over whether I should have my freedoms or not.
16. Relatedly, but differently, Pettit holds that *exercised* dominating power undermines people's freedom more than unexercised dominating power (Pettit, 1997). Therefore, because no prisoner leaves in Prison, they cannot be maximally unfree.
17. Can we talk about 'domination' seeing that inmates have *equal* power over one another? Yes. Simple power equality does not guarantee good republican control. I defend the idea of 'mutual domination' elsewhere (Schmidt, 2018).
18. Steiner, for example, argues that compossibility is implied by the logic of rights (Steiner, 1977). See (Carter, 1999, Chapters 9.4) for more general objections.
19. Alternatively, one could hold that socially incompossible freedoms can contingently generate individual unfreedom. However, this would not meet the Philosophical Challenge, as prisoners in Prison do not leave. It is somewhat unclear whether Cohen thought incompossibility was conceptually or contingently problematic for freedom. At times, Cohen highlights the contingent connection: 'As soon as enough people exercise the coexisting individual freedoms, collective unfreedom generates individual unfreedoms.' (Cohen 1988, p. 270) Nicholas Vrousalis, however, seems to attribute a stronger, conceptual connection to Cohen (Vrousalis 2015, chap. 2; note 9).
20. Kramer individuates freedoms not only with respect to acts themselves but also their causal effects.
21. Kramer's measure aggregates sets of freedoms and sets of *unfreedoms*. However, we can ignore this issue here, because including unfreedoms does not change the order over Prison* and Prison.
22. Specifically, the response implies the Hybrid View of overall freedom and that adding the freedom-to-φ-while-causing-something-bad increases overall freedom less than adding the freedom-to-φ-without-causing-something-bad. Carter, for example, attacks the Hybrid View (Carter, 1999, Chapter 5.4, 2005). For the record, I find Kramer's assumptions here plausible.

23. Liberals respond that they account for domination through the probability with which domination leads to interference (Carter, 2009; Kramer, 2009). However, the degree of non-domination depends on extent and intensity, which is not proportional to the probability of interference. Republicanism thus picks out a *separate normative concern*. Accordingly, liberals and republicans concur in many of their judgements but diverge in others. And in Prison and Just Sentence, republican judgements plausibly diverge from liberal judgements.
24. Although capitalism might engender those dependencies too.
25. Carter adds that, according to Marxists, proletarians also have the collective *freedom* to stop being an oppressed class, because they can collectively overthrow capitalism (Carter, 1999, pp. 253–256).
26. I did not discuss Carter's response earlier, because his response does not help with meeting the Philosophical Challenge. Invoking conjunctive exercisability and probabilities makes no difference in Prison and Prison*, because we assume no one leaves (Kramer, 2003, pp. 229–230).
27. See, for example, (Gourevitch, 2011, 2013; Leipold et al., 2020; Muldoon, 2019; O'Shea, 2020; Roberts, 2019).
28. Roemer develops a different argument. Taking equality of opportunity seriously conceptually implies much greater material equality (Roemer, 2000).

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