Greek Democracy, Modern Democracy

Lights and Shadows

IGNACIO MEDINA NÚÑEZ

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Prologue

This book is fascinating and exceptionally rigorous. Its tone is inviting, clear and straightforward, with solidly explained ideas and arguments. The text reflects meticulous research, resulting from a lifetime of scholarship and teaching experience around the world. One of the greatest attributes of *Greek Democracy, Modern Democracy: Lights and Shadows* is precisely this depth – it is a product of a lifetime of political investigation and practice from both professional and academic perspectives. Readers can trust Dr. Medina's sincere dedication to democracy, a topic continually subject to fierce debate.

This book, or rather, research endeavor, is ideal for class discussions, individual reading, and methodological study. It offers key guiding questions and an extensive, carefully documented bibliography. Without a doubt, it is a thoroughly researched work that deserves a place in every university library.

Dr. Medina, or 'Nacho' as he is known by colleagues and students, takes the time to introduce democracy by guiding readers to its origins as a concept, an idea, an aspiration, and as the political tendency necessary for the development of society. However, from the very start, Nacho makes it clear that democracy's emergence occurred in continuous confrontation with its greatest and most enduring opponents: Plato and Aristotle. Democracy, thus, has always faced a twofold task: to continually define itself throughout history, and to defend itself against alternative forms of government.

Beyond conventional wisdom regarding democracy, the author introduces critical discussions about its early development and the struggles of democracy's first advocates. As readers delve deeper into the text, they will quickly appreciate the high level of scholarship evident in the documentation provided: names, dates, places, significant historical events, Greek linguistic roots, sayings, customs, and traditions. In short, the work

serves as an authentic academic resource for advanced learning, and thus constitutes a fundamental resource for students of Politics, Philosophy, and History.

Additionally, Dr. Medina highlights the often-overlooked interconnection among these academic disciplines, particularly emphasizing the dynamic interplay among Politics, Philosophy, and History. Indeed, Dr. Medina expects academic rigor from his students, affirming that professional studies in Politics must include Philosophy, History, Geography, Anthropology, and Sociology. Without doubt, this thoroughly researched work faithfully reflects a distinctly Latin style of writing, where everything matters: personal stories, anecdotes, recollections, and the reconstruction of events often forgotten, ignored, or deemed irrelevant by mainstream currents of thought.

Finally, readers are implicitly invited not merely to learn facts of significant importance, but also to reflect upon the very foundations of democracy. Beyond presenting what is evident, the task becomes examining whether democracy makes politics possible, or rather, politics makes democracy feasible. This is not a circular axiom, but rather the curious necessity of exploring whether it is Ethics itself we seek as the point of origin – the personal struggle of Solon, the test of his character, and ultimately, the emergence of a democratic spirit nurtured by human equality and liberty.

Dr. Medina clearly argues that democracy depends on the political reality of the state. Moreover, the political reality of any state manifests itself in the distinctions it draws between friends and foes, and in how it treats its citizens. Consequently, minority groups will continue their struggle for legal recognition, whether in advanced or less developed societies. Undoubtedly, in this book – and indeed throughout his entire academic repertoire – readers will recognize in Dr. Medina a true champion of democracy.

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Introduction

In Latin America – and indeed around the world – there was a remarkable political transition during the 20th and 21st centuries. Significant shifts occurred in dictatorial and authoritarian regimes towards establishing governments through electoral processes. With some justification, many have labeled these events a "Transition to Democracy," as occurred in the late 20th century in countries such as Chile, Paraguay, Haiti, and Argentina, and even in some governments resulting from the so-called Arab Spring of 2011, including Tunisia, Egypt, and Libya. However, there are still nations where hereditary monarchies continue to prevail, such as certain Arab countries; in these nations, the transition toward electoral democracy remains desirable.

American imperialism does not believe in democracy when electoral results do not align with its interests. It accepts dictatorial regimes if they represent strong alliances within the global geopolitical context. Electoral processes do exist in Latin America today, yet the United States persistently labels countries such as Cuba, Venezuela, and Nicaragua as dictatorships – solely because their governments refuse to be docile or submissive to American interests. One would not hear such frequent accusations if these governments yielded to economic and political demands imposed by the U.S.

Thus, in the international arena, the democratic discourse promoted by the United States has always been hollow, given its main criterion for action has consistently favored economic elites and governments aligned with its interests. This stance has drawn severe criticism against American democracy, such as Sheldon Wolin's analysis of George W. Bush's administration in the early 21st century, in which he argued that in the U.S., "representative institutions no longer represent voters", characterizing it as a form of "Inverted Totalitarianism" (Wolin, 2003).[1]

1 Representative institutions no longer represent voters. Instead, they have been short-circuited, steadily corrupted by an institutionalized system of bribery that renders them re-

However, there is no doubt that the democratic discourse accompanying the era of neoliberal dominance since the late 20th century has encouraged transitions toward models that implement at least electoral processes for selecting leaders. In Latin America, the terrible dictatorships of Somoza in Nicaragua, Stroessner in Paraguay, the Duvalier family in Haiti, and Pinochet in Chile have come to an end.

Yet, particularly in the 21st century, critical questions arise regarding the effective functioning of democracy throughout the region: Has democracy's objective been fulfilled merely by implementing electoral processes? Why are levels of dissatisfaction rising in countries already governed by elected civilian administrations? If democracy is indeed desirable, why do so many eligible voters fail to participate, in some cases with abstention rates exceeding 50%? Democracy remains a subject of ongoing public debate in our political systems; not simply due to authoritarian tendencies, but primarily because elections alone have failed to meet the interests of the majority. Democracy, of course, entails transparent elections as one of its essential characteristics, yet clearly it cannot be reduced to this single indicator.

This setting inspired the drafting of this book, beginning with a return to ancient Greece, where democracy as a concept was first articulated, and practices of citizen participation in open discussions about public issues emerged. There, one finds extraordinary achievements and inspiration, but also significant errors, mistakes, and manipulations of popular will. For this reason, our work emphasizes both the lights and shadows of democratic processes evident from that ancient period.

I employ a comparative approach, recalling what Lasswell (1968) argued in *The Future of the Comparative Method* – that every scientific study inevitably requires comparative perspectives, even when addressing vastly different historical periods.[2] Sartori and Morlino (1994) similarly advocate a strategy that identifies both similarities and differences, which then facilitates attempts at generalization. Methodologically, I draw extensively

sponsive to powerful interest groups whose constituencies are the major corporations and wealthiest Americans. The courts, in turn, when they are not increasingly handmaidens of corporate power, are consistently deferential to the claims of national security. Elections have become heavily subsidized non-events that typically attract, at best, merely half of an electorate whose information about foreign and domestic politics is filtered through corporate-dominated media (Wolin, 2003).

2 "Isn't the scientific approach unavoidably comparative, since to do science is to formulate and attempt to verify generalizations by comparing all relevant data?" (Lasswell, 1968, p. 3).

on Michel Foucault's approach (2019) to classical Greek thought, which consistently references contemporary situations and challenges. Konstan (2015), for his part, goes as far as asserting that what it is now understood by *demokratia* (in Greece) and *res publica* (in Rome), in modern times, "only have a tangential relationship with classical antiquity" (Konstan, in Hammer, D., 2015, p. 9).

The contexts are clearly vastly different. Nonetheless, despite this complexity, meaningful comparisons between ancient and modern democracy remain possible, as extensively discussed by Hansen (1989, 1991, 1992, 1997), who identifies similarities and differences between these periods.[3] Ancient Greek practices of citizen participation can still inspire contemporary democracies, as can ideals centered on popular governance, although certain negative practical experiences from antiquity are no longer appropriate today.

Indeed, the famous 17th-century French debate over the differences between Ancients and Moderns in literature and art – the *querelle des Anciens et des Modernes* – has similarly extended into the field of political theory.[4]

With detailed and in-depth analysis, Hansen (1992) emphasizes a critical distinction in the discussion about democracy: one thing is the

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3 Hansen poses this question: "How much do Athenian *demokratia* and modern democracy have in common and, second, to what extent were modern democratic ideas and institutions shaped by looking back upon the ancient model?" (Hansen, 1992, p. 14). Hansen carries out an in-depth study of how democracy was understood in the 18th, 19th, and 20th centuries, highlighting the relatively minor influence that Athenian experience may have had on modern discussions, but ultimately recognizing that although "the tradition of Athenian democracy did not count for much... a study of the democratic political ideals shows a striking similarity between Athenian democratic values and the liberal democratic values of the 19th and 20th centuries" (Hansen, 1992, p. 27). In fact, Hansen (1989) previously asked "Was Athens a Democracy?" – a question now answered emphatically in the negative, considering the exclusion of women, slaves, and foreigners from the political process.

4 This quarrel – the dispute between Ancients and Moderns – arose and deepened from the confrontation between Nicolas Boileau, who defended the Ancients as represented by Greek and Roman models, and Charles Perrault, who advocated the superiority of the Moderns, seeing considerable advancement over pagan antiquity, even claiming that the monarchy of Louis XIV surpassed the experiences of ancient Athens or Rome. Perrault presented his position to the French Academy in 1687 with his poem *Le Siècle de Louis le Grand*, which was later challenged by another Academy member, Nicolas Boileau-Despréaux, who championed the classical and humanist virtues of antiquity against modernist perspectives.

actual experience of democratic institutions within a political system, and another is democracy as an ideological model. In Greece, experiences of popular government took the form of direct democracy, whereas in Rome they were indirect, occurring through representatives. At this level, my analysis focuses on what I consider the great lights and shadows of Greek democracy, noting also how the ideals of this model could have inspired revolutionary movements in the United States in 1776 and France in 1789.[5] However, Plato and Aristotle, and even Polybius – when he uses the concept of ochlocracy (ὀχλοκρατία), meaning the power of mob rule as a disorganized multitude – never fully trusted democracy, as they considered voting processes easily controlled by poorly educated and impulsive majorities, given that most people are driven by passions of the moment.

Beyond the 17th-century *Querelle des Anciens et des Modernes* in France, which revolved around art and literature, differences between the two historical periods were explicitly addressed in the works of Benjamin Constant, particularly in his lecture *De la liberté des Anciens comparée à celle des Modernes* (Liberty of the Ancients compared with that of the Moderns, 1819), and Isaiah Berlin (1969), notably in his essay *Two Concepts of Liberty*.[6] In these works, one finds two distinct approaches to ancient and

5 This perspective was extensively developed by Hannah Arendt (1990) in her book *On Revolution*. Medina and Verdin explored this view more thoroughly in chapter 2 ("Libertad y Felicidad pública en las Revoluciones del siglo XVIII" / "Liberty and Public Happiness in the Revolutions of the 18th Century") of a book edited by Ignacio Medina (2016). Hansen, however, highlights a different perspective: "The classical example that inspired the American and French revolutionaries as well as the English radicals was Rome rather than Greece... the Founding Fathers who met in Philadelphia in 1787 did not set up a Council of the Areopagus but a Senate" (Hansen, 1992, p. 18). In chapter two of this book, I analyze how Spinoza revisits the Greek concept of democracy but also employs the republican tradition inspired by ancient Rome when discussing Jan de Witt's government in Holland.

6 Isaiah Berlin consistently placed freedom and pluralism of human values at the center of his thought. In his 1953 work *The Hedgehog and the Fox*, he presents a contrast in visions symbolized by the two animals: the hedgehog represents monism – focused on a single, overarching principle (self-defense) – whereas the fox symbolizes pluralism, open to multiple perspectives. He quotes the ancient Greek poet Archilochus: "The fox knows many things, but the hedgehog knows only one big thing". Both animals reflect a polarity classifying cultures and human perspectives, affirming the fundamental freedom to choose. From 1958 onward, Berlin developed his famous distinction between positive and negative liberty, elaborated especially in *Four Essays on Liberty* (Berlin, 1969), particularly in the essay "Two Concepts of Liberty". Positive liberty occurs when the individual willingly submits to a collective will, while negative liberty prioritizes individual freedom against external coercion. Applying this distinction historically, Berlin aligns ancient thought with positive liberty, contrasting it with

modern theory, especially regarding liberty. Constant emphasizes that in ancient Athens there was "the complete subjugation of the individual to the authority of the whole... All private actions are subject to severe surveillance" (Constant, 1819, p. 2). Similarly, in Republican Rome, "the individual finds himself somehow lost in the nation, the citizen in the city" (Constant, 1819, p. 3). Thus, he observes that "the ancient objective was the distribution of social power among all citizens of the country; this was what they called freedom" (Constant, 1819, p. 6). On the other hand, in modern times, the individual is independent in private life. Greater importance is assigned to individual freedom, even though that everyone remains subject to the law of the state – a notion of individual rights unknown in antiquity. Thus, the concepts clearly cannot be understood identically when comparing ancient times to modernity, although Constant himself admits that Athens was the ancient state closest to modern conditions: "Athens is the one who resembled most to all modern" (Constant, 1819, p. 3).

Dr. Pietro Montanari (2023) also insists on the care needed when employing terms such as "Classical" or "Ancient" in a globalization era markedly different from ancient Greece, even though there is a clear connection. Montanari specifically questions, "What meaning can we give to the classic in an era of globalization that rejects, precisely, all forms of cultural imperialism?" (Montanari, 2023, p. 483). This is particularly relevant given the polysemic nature of the concept. Previously, it referred exclusively to Greco-Roman antiquity, but today we speak of "classics" among both ancient and modern thinkers. Indeed, for several centuries there has been a notable revival of classical thought, as reflected in Jeffrey Alexander's work, *The Centrality of Classics*, which seeks to define who merits such categorization, arguing that "the classics occupy a central place in contemporary social science" (Alexander in Giddens and Turner, 2001, p. 22). Montanari – quoting Ortega y Gasset – further emphasizes "a substantial link between classic and present" (Montanari, 2023, p. 503), maintaining that "the classic is in the present and, therefore, has been a thousand times and can always be an active producer of noise, inauthenticity, bad faith and ideology" (Montanari, 2023, p. 504).

When approaching the concept of Politics, one must acknowledge that Plato's (1892b, Vol. III) view in *Republic* and Aristotle's (1916)

modernity's emphasis on negative liberty: "There is a plurality of values, and each civilization develops some more than others" (Fermandois, 2000, p. 330).

understanding in *Politics* relate primarily to the social dimension of human beings, while Machiavelli offers a distinct conception, emphasizing the reason of State. This shift, especially regarding political language, is extensively analyzed by Viroli (1992) in his book *From Politics to Reason of State: The Acquisition and Transformation of the Language of Politics 1250–1600*. In the specific Italian context from the reception of Aristotle's texts in Europe until the 16th century, Viroli highlights a clear interpretive evolution that constitutes a genuine political revolution, distinguishing Greek city-states sharply from the conditions giving rise to modern European nations. Thus, I delve deeper into what Pocock (1975) termed "The Machiavellian moment", where the concept is already becoming associated, according to the Cambridge Dictionary definition, with "the use of intelligent but often dishonest methods that deceive people in order to gain power or control" (*Cambridge Dictionary*).[7] However, "Machiavellian" also encompasses a humanist perspective, trusting humans as social actors capable of societal change without divine intervention.

While acknowledging the considerable difficulty in comparing two vastly different historical periods, I undertake this complex task, fully aware of the risks associated with using concepts interchangeably across epochs. One should be cautious and not to assign identical meanings to distinct historical contexts. Nevertheless, the ideal of a democratic and egalitarian society endures. It is critical to recognize historical errors and avoid repeating them in contemporary experiences of popular participation, consistently reaffirming a general trajectory toward a model in which the interests of the people prevail. Despite this ideal, thinkers such as Schumpeter (1942) have argued that the masses, or plebs, are driven predominantly by irrationality and transient impulses, with little substantive influence on government policies.

Finally, in this book, I highlight how democratic thought and practice essentially vanished from political theory and reality for many centuries – from the 3rd century BC until the 17th century AD.[8] After Alexander the

7 This is the definition of *Machiavellianism* in this Dictionary: https://dictionary.cambridge.org/us/dictionary/english/machiavellianism?q=Machiavellianism

8 Political history has highly valued the Roman Republic (*Res Publica*, from the 5th to the 1st century BC) as a model of representative democracy – despite recognizing that representative principles were also applied during Solon's time, even if Romans did not adopt the Greek concept of democracy. The political-cultural legacy of Greece and the Roman Republic provided, controversially but significantly, a foundation for the revival of democratic thought in the 17th century.

Great's death, Macedonian domination eradicated democratic governance. Kings and emperors ruled, especially following the establishment of the Roman Empire in the 1st century AD and continuing through the dominance of the Catholic Church during feudalism. It was only with the European Renaissance and 17th-century rationalism that the democratic model returned forcefully to public discussion.

This is why the second part of this book focuses precisely on what G. Sabine (1939) has called "the second great historical moment of political theory", represented by the thinkers of the 17th century in Europe – especially in England – whose dynamic continued throughout the Enlightenment and has repercussions to this day. Precisely in the 17th century, I pay special attention to Baruch Spinoza (1670) because in his thought I find a new proposal for democracy as the model best aligned with reason, in contrast to other forms of government. Spinoza's philosophical reflections are particularly evident in his work entitled *Tractatus Theologico-Politicus* (TTP), where he analyzes the republican (*Res Publica*) experience in Holland, specifically the government of Jan de Witt from 1653 to 1672, within the context of Spinoza's own excommunication by the Jewish community. In this democratic model, the philosopher emphasizes one of its fundamental characteristics – freedom of thought – reaffirming democracy and republican governance.

I dedicate a final section to the topic of truth and post-truth, acknowledging that, despite the necessary freedom of expression, not all people act rationally or in pursuit of the common good. While we live in democratic models in the Western world that undoubtedly allow everyone to express an opinion, not all who express themselves seek truth; rather, amidst vast amounts of information, misinformation, lies, and defamation widely proliferate.

In addressing modern democracy from the 17th century onwards, I again encounter lights and shadows that will likely continue accompanying the struggle for this form of government. Democracy persists because it has become a utopia – a concept inspired by the work of Thomas More in 1516 – but one exhibiting both positive and negative features in empirical practice. Our work openly favors the democratic model with its fundamental attribute of freedom of expression, but simultaneously highlights the significant difficulties inherent in its practical implementation in a contemporary world where two great currents remain in confrontation – what the Greeks called

aristocrats and democrats. Both currents persist among contemporary political actors within democratic frameworks, employing diverse methods of persuasion, intimidation, deception, and violence to maintain or enhance their power in different contexts. Today, we may continue envisioning the utopia of a renewed democracy, but in daily practice, we must firmly ground ourselves in a political reality defined by an intense confrontation of forces, which remains essentially a struggle for power – often regardless of ideology.

Chapter I.

Origin and Development of Democracy in Ancient Greece

From a historical point of view, Athenian democracy is, without a doubt, the experience that best symbolizes that first vision, and for this reason scholars on this subject usually return to it again and again. It evokes a powerful image, although not entirely true: that of the group of citizens gathered in an assembly to decide on collective affairs directly and without mediation (Nun, 2015, p. 25).

The first formal discussion about the different forms of government – *i.e.*, Monarchy, Aristocracy, and Democracy – was not introduced by Plato in the "Republic", nor by Aristotle in his work "Politics" (4th century BC), but is found earlier in the book "The Histories" by Herodotus (2010) in the 6th century BC, where three Persian characters question the best governmental model after the death of Cyrus's last direct descendant. However, it was in Athens where democratic practices were first introduced during the 6th century BC, with people participating in assemblies, initially under Solon's government and later more clearly with Cleisthenes, enabling direct citizen involvement.

In this chapter, I focus on the origin and development of the Athenian democratic model from the 6th to the 4th century BC, although other city-states also practiced it.[9] I examine the strong inspiration of the concept

9 This is what Fritz Gschnitzer affirms, stating: "Athens, as we have already pointed out, was not a special case. Similarly, in other parts of the Greek world, democratic reforms were achieved, with the introduction of some isolated democratic sections in the constitution or even completely democratic constitutional systems, even if at first they were still an instrument and plaything of aristocracy" (Gschnitzer, 1987, p. 130).

of Demos (δῆμος), which included most citizens in political activity, while also recognizing the great deficiencies of this type of government. These deficiencies led thinkers like Plato and Aristotle to prefer other models, expressing a rejection of democracy in favor of aristocracy – the rule of the best. As Pisarello states: "The Socratics of the most diverse tendencies, and Plato above all, maintained a position of radical aversion towards this political regime ... their class reflex was to repudiate it and link it to anarchy" (Pisarello, 2011, p. 35).

Thus, I begin with a section on the first attempt at equality during Solon's time as archon in mid-6th century BC; then I address Herodotus's formal discussion of three types of government among the Persians. Third, I examine the initial democratic experiments, with their significant lights and shadows in practical Athenian life under Cleisthenes and Pericles. Fourth, I explore differences in democratic practices between the 5th and 4th centuries BC. Fifth, I discuss direct democracy as exemplified by the Greek institution of ostracism. Sixth, I pay special attention to freedom of expression through the concept of Parrhesia.[10] Finally, I conclude by balancing the virtues and criticisms of the democratic model.

Solon and democracy in Athens

Solon was probably born around 638 BC in Athens and died in about 558 BC, at the time when the first pre-Socratic philosophers appeared.[11] That period was a watershed between the age of myth-based religious beliefs and the birth of science. It was a time of transition from myth (μύθος) to logos (λόγος), in which, although the belief in many Greek gods persisted, scientific thought began to emerge, based on the idea that it was not the gods who shaped the destiny of humans, but humans themselves who were responsible for their own future.

This was the first great moment of political theory in Western thought – as Sabine (1939) calls it – where one can speak of the emergence of science

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10 This concept is fully explained as "Frankness and Freedom to Speak" among the Greeks in Michel Foucault's *Discourse and Truth and Parrēsia* (2019), which will be examined in more detail in section 6 of this chapter.

11 Before the pre-Socratic period of the 6th century BC, Gigon (1945) in *Der Ursprung der Griechischen Philosophie*, gives importance to Hesiod in the 8th century BC, particularly highlighting *Works and Days* as a significant early example of social analysis.

overcoming earlier fanciful explanations based on divine intervention. Before then, there had certainly been a dominant religious and even tragic worldview, with the belief that gods determined everything in nature and society. This is shown in Homer's "Hymns": "Heaven's gifts despite our grief we mortals needs must bear, for the yoke is laid upon our necks". In this way, the stories of the "Iliad" and the "Odyssey" clearly reveal the interplay of the Olympian gods with the war actions of Greeks and Trojans, with multiple divinities moving the destinies of cities.[12]

However, this view changed in pre-Socratic times, when the Greeks realized their own capacity to influence nature and the course of society. It was a shift from mythology to science – from a vision in which divinity decided the world and human fate, to a more rational interpretation in which human beings became genuine actors. Alcántara (2012) expresses this well:

> The key factor in this acquisition and learning process by the Greeks in a more rational way of thinking is the fact that some of them rejected myths, considered until then as the only option to explain their existence, and discovered and began to apply an objectivist approach, based on the observation and recording of reality of natural phenomena, thus initiating the development of a scientific notion as a knowledge instrument separate from and opposed to myth, magic and revelation (Alcántara, 2012, p.21).

This era extended from Hesiod[13] through the pre-Socratic philosophers – *e.g.*, Thales, Anaximander, Anaximenes, Heraclitus, Pythagoras, Xenophanes, Parmenides – until the emergence of philosophy itself as a science, as Gigon (1945) verifies.[14] It was exemplified above all by Thales of Miletus (624–546 BC), a philosopher, mathematician, physicist, legislator, and astronomer who, for the first time, predicted a solar eclipse on 9 July

12 Even the great stratagem developed by Odysseus to win the Trojan War by means of deception – the wooden horse – was inspired by the goddess Athena.

13 Olof Gigon identifies Hesiod, though a poet, as the first thinker to seek truth beyond myth – distancing himself from Homer, who viewed human life as determined by the gods: "This is the first philosophical moment that begins with Hesiod: it is the first moment in which one begins to learn to know the truth" (Gigon, 1945, p. 15).

14 These pre-Socratic thinkers differ widely in their explanations of nature – proposing water (Thales), air (Anaximenes), νοῦς (spirit, intelligence – Anaxagoras), earth (Xenophanes), fire (Heraclitus), atoms (Democritus) or numbers (Pythagoras) – as the unifying force of all that exists. Yet all agree that nature follows autonomous laws that can be understood by reason, and that humans, not gods, are responsible for order and disorder in the world.

585 BC, thus demonstrating that natural events were not the work of gods but of autonomous laws discoverable by human observation.[15] Hence, the pre-Socratics symbolize the birth of natural and social sciences through philosophical thought.

Solon captured this change in his reference to Eunomia (Εὐνομία: good law), stating that the destiny of Athens did not lie with the gods, but rather with its citizens, who through their own failings could destroy the city:

> Our city will never perish by the decree of Zeus or at the behest of the happy gods … But its own citizens, with acts of madness, want to destroy this great city in order to seek their own profits, and the unjust greed of the leaders of the people, who await many pains to suffer for their great abuses. Because they do not know how to control their satiety or put order to their current triumphs in a peaceful celebration. They become rich by yielding to unjust dealings (Solon, in García Gual, C., 1998, p. 42).

Solon is considered one of Greece's seven wise men, a list that was gradually compiled over several centuries until it was essentially defined at the end of the 4th century BC.[16] This list is a tradition in the heritage of ancient Greece, but it shows some variations in the names, depending on Plato in the *Protagoras*, Aristotle, or Plutarch (1566) in his *Septem Sapientium Convivium* (*The Banquet of the Seven Sages*), and reaching as far as Diogenes Laertius (180–240 AD).[17]

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15 Although this has been recognized since the 6th century BC, myth has persisted throughout human history – even today, many continue to believe that God governs every event. The popular belief that "the leaf does not move on the tree without the will of God" – literally from *Don Quixote* (ch. 2) addressed to Sancho – is inspired by the Gospel of Matthew: "not one of them will fall to the ground without the consent of your Father" and "even the hairs of your head are all numbered" (Matthew 10:29–30). Despite scientific advances, many still attribute all events to divine will.

16 The list of the Seven Sages of Greece evolved over time – many names were discarded until the symbolic number seven was established between the 6th and 5th centuries BC. Most were poets. Apart from several of Solon's writings, only sentences and fragments survive. Herodotus refers to several (Solon, Chilon, Thales, Bias), especially in the meeting with King Croesus of Lydia. Plato, in *Protagoras*, canonized the Seven Sages from 588 to 577 BC: Thales of Miletus, Pittacus of Mytilene, Bias of Priene, Solon of Athens, Cleobulus of Lindos, Myson of Chen, and Chilon of Sparta. Other sources include Andron of Ephesus, Eudoxus of Cnidus, and Diogenes Laertius. Aristotle (4th century BC) established them as a fixed group.

17 Johannes Engels (2010), in *The Seven Sages of Greece: Lives, Teachings and Legends*, offers a detailed account of the sages, tracing their portrayal from Herodotus to Plutarch's

> The seven wise men are to give advice to establish order in the Polis … The illustrious seven wise men, as described by the pen of Diogenes Laertius, are located right in the middle of Greek thought, between the rural and the city, between poetry and philosophy, between the archaic and the scientific; they are the step that consolidates the community and social organization, which allows the arrival of science and respect for it (Valenzuela, 2014, p. 18).

In all versions of the seven, Solon always appears – alongside Thales, Bias and Pittacus – with his multiple roles as poet, thinker, wise man, legislator and so forth. Plutarch himself places him among the most distinguished – as the wise man par excellence – referring to Chilon's words, pointing out that "it was right that Solon began the dissertation, not only because he was older than everyone else and happened to be sitting first, but because he exercised the highest and most perfect power for having given the Athenians their laws" (Vela Tejada, 2008, p. 512). Furthermore, in *Timaeus*, Plato's dialogue, he also named him this way: "Solon was not only the wisest of men, but also the noblest of poets" (Plato, 1892b, Vol. III, pp. 441–42).

What is remarkable about Solon is that he was not only a wise man, thinker and philosopher, but that he intervened directly in Athenian politics, becoming its ruler (archon) in 594 BC with important social reforms considered the beginning of a new way of governing. Plutarch comments: "In philosophy, even more than in the moral part, he devoted himself to politics, like most wise men of that time" (Plutarch, 1821, no. 3).[18]

Herodotus (2010, Book I, no. 30) recounts Solon's meeting with King Croesus of Lydia (now part of Turkey) in the mid-6th century BC, then the richest and most powerful kingdom until Cyrus, King of Persia, defeated him in 546 BC. At the height of his splendor, Croesus believed himself the happiest man in the world thanks to his great accumulation of wealth. When Solon challenged this view, he showed him two examples of men whose situations demonstrated that they had been truly happy, despite having fewer resources, because they had lived for the good of the Polis. Croesus, unable to understand the reasoning, dismissed Solon as ignorant

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Septem Sapientium Convivium (1566) and Diogenes Laertius' *Lives of Eminent Philosophers* (1972).

18 Citations from Plutarch (2014) refer to the Loeb Classical Library edition of *Parallel Lives* in electronic format. Each life is divided into numbered sections – citations include the publication year and section number.

and continued expanding his Lydian kingdom and hoarding more wealth. However, his obsession with riches led him to misread the Delphic oracle, wrongly believing it predicted the fall of an enemy empire – *i.e.*, the Persians – when it actually referred to the collapse of his own. The fundamental idea in Solon's thought is that excess leads to pride, and pride can easily lead to ruin, a lesson that was confirmed by Croesus's defeat by the Persians.

It must be noted that Solon did not promote the rejection of wealth itself but, as he expressed in *The Elegy of the Muses*, criticized only the desire and will to acquire riches by unjust means. It is legitimate to wish for a good standard of living, but not to seize what belongs to others: "Although I wish to have riches, I do not want to obtain them in an unjust way" (Solon, in Lisi, 2000, p. 72). This position is clear: material possessions are not evil in themselves but acquiring them unjustly is. If they are obtained honorably, there is no reason to renounce them: "However, it is irrational and ignoble to renounce the acquisition of what we want for fear of losing it" (Solon, in Plutarch, 1914, no. 7, p. 421).

In this, he echoes a tradition already expressed by Hesiod (2006) in *Works and Days*, where he reproached his brother Perses for unjustly taking their father's inheritance, urging him instead to uphold justice. Solon also addressed humanity's tendency to accumulate more and more wealth, which reveals a destructive greed that deprives others of their goods: "There is no manifest limit to wealth [*ploútou*] for men ... Those who have more means seek, however, to have more and more" (Solon, in Díaz López, 2017, p. 97). Thus, many mortals try to hoard material resources in a disorderly manner at the expense of the most vulnerable.

This way of thinking is directly connected to Athenian politics and the city's way of governing. According to Coulanges (2002), centuries before absolute monarchy was broken in Athens by Theseus, an assembly of tribal chiefs had formed to deliberate on the city's most important decisions, establishing a tradition that continued over generations: "Theseus changed the government of Athens, and from monarchical he converted it to republican" (Coulanges, 2002, p. 297). In practice, however, this was an aristocratic model, dominated by notables who by the 6th century BC were known as the εὐπατρίδαι (*Eupátridas*: the well born) – landowners who had progressively weakened the monarchy's power.[19] It was an oligarchy that

19 The author explains the transition thus: "Theseus, as tradition says, placed sovereign authority in the people's hands. Except that the word people, δῆμος, preserved by tradition,

ruled by exploiting and impoverishing most people, especially through Draco's harsh laws of 621 BC, which imposed very severe punishments for both major and minor crimes.

Before Solon, there had been a prolonged period of rebellion against these notables, as Aristotle (1912) describes in *On the Athenian Constitution*,[20] revealing a persistent conflict verging on civil war between classes: on one side the notables and oligarchy, and on the other the landless commoners, who rose up without rights in the city, beginning a true revolution in a deeply unequal situation: "the bad have prevailed over the good" (Coulanges, 2002, p. 339).[21] It was common for oligarchies to claim a greater right to wealth, which created tensions with the mass of impoverished citizens; for them, their situation worsened as their debts grew, and they often had to repay these debts with their own freedom through slavery.

With Solon, the concept of the Assembly was born, where all citizens could equally have some power to intervene in public affairs: "Solon was the one who promoted this Assembly so that it would function effectively, and its importance would be recognized. He ordered that all free Athenians be admitted to it, even if they were not landowners" (Alcántara, 2012, p. 106), and in the meetings everyone could speak, even if they were not rich: "All individuals were allowed to speak in Solon's assemblies, which had already been opened to the fourth, the last of the classes, the thetes" (Momigliano, 1973, p. 258). Furthermore, following Aristotle's analysis, one can see the strong contrast compared to the previous situation where only the aristocrats dominated:

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did not have such a broad meaning in Theseus' time as in Demosthenes'. This people or political body could then only be the aristocracy, that is, the set of leaders" (Coulanges, 2002, p. 297). Theseus, king of Attica, did not hold absolute power but was *primus inter pares* in a federated assembly. His rule ended in revolt, forcing him to flee to Scyros, where he died (Plutarch, 1821, *Theseus*, no. 35).

20 This text by Aristotle was discovered in the 19th century and published by Sir Frederick G. Kenyon in 1891. *The Athenian Constitution* was one of 158 constitutions Aristotle analized to support his *Politics*. The work is believed to have been written in 329 BC.

21 For example, Coulanges (2002) observes: "The poet Theognis gives us a fairly clear idea of this revolution and its consequences. He tells us that in Megara, his homeland, there are two classes of men. One he calls the good, ἀγαθοί; this was in fact the name given to them in most Greek cities. The other class he calls the bad, κακοί; this name was usually used to designate the lower class" (Coulanges, 2002, p. 339).

> This economic policy was based on the fact that land lease contracts (μίσθωσις) were carried out under the concept of a peculiar type of interest-bearing loan (δανεισμός) in which the applicant for the loan committed 'the person', but strictly speaking committed 'the bodies' (σώματα), not only his own, and hence the plural 'bodies', but also that of his children and his wife. Aristotle reports that such a system, with the serious consequences it had existed until the time of Solon, i.e., until 594. The philosopher adds that the most terrible and bitter thing for the great majority was the fact that they could become constitutional slaves (κατὰ τὴν πολιτείαν) (Ath. Pol., 2,3) and a second observation of Aristotle is that the people lacked absolutely any participation (οὐδενὸς ... μετέχοντες) (Ath. Pol., 2,3) (García Cataldo, H., 2016).

Furthermore, since the Athenian army was made up of citizens, the so-called hoplite warriors were decreasing day by day as they became slaves.[22] For Solon, the analysis of this situation and its disastrous effects on the survival of the state was very clear: "it is the citizens themselves [*astoi*] who, with their follies, want to destroy the great polis, persuaded by riches" (Solon, in Díaz López, L., 2017, p. 101). Solon became ruler of the city through the consensus of several social groups, at a time when his way of thinking and being could give hope to both opposing sides. Plutarch points out:

> At this point, the wisest of the Athenians cast their eyes upon Solon. They saw that he was the one man least implicated in the errors of the time; that he was neither associated with the rich in their injustice, nor involved in the necessities of the poor. They therefore besought him to come forward publicly and put an end to the prevailing dissensions. And yet Phanias the Lesbian writes that Solon of his own accord played a trick upon both parties in order to save the city, and secretly promised to the poor the distribution of land which they desired, and to the rich, validation of their securities. But Solon himself says that he entered public life reluctantly, and fearing one party's greed and the other party's arrogance. However, he was chosen archon to succeed Philombrotus, and made mediator and legislator for the crisis, the rich accepting him readily because he was well-to-do, and the poor because he was honest (Plutarch, 1914, Solon, No. 14, p. 439).

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22 The Greek word *hoplite* refers to the infantry's heavy arms (spear and shield), which each citizen-soldier purchased himself. "Since each hoplite could participate in battle only to the extent that he could have his own equipment, hoplitism needed a certain social balance, incompatible with the pre-Solonian situation of deprivation and penury... In this military context, a polis like Athens would not survive if it continued in the dynamic in which it was immersed" (Díaz L.L., 2017, p. 100).

In this sense, Solon's role was not only that of an archon as ruler, but also as a negotiator and conciliator in a very risky position (διαλακτὴν καὶ ἄρχοντα), because it was not a matter of taking sides but of mediating to see if intermediate solutions were possible:

> They named him as a *diallaktēs*, as well as an archon. The word διαλλακτής has often been translated as 'arbitrator' and even better as 'mediator'. 'Arbitrator' in its Latin sense comes to represent for us the 'judge', that is, the figure of an absolute sovereign. However, in Greek it refers to the person who manages to bring together, especially parties in conflict, who changes their feelings and therefore their character (there is a paidetic effect on ἦθος (*ēthos*). Therefore, the best meaning of the word would be something like 'conciliator', 'reconciler', a meaning that seems to gain greater strength in the Stagirite's interpretation: a mediator who seeks reconciliation where hatred has generated distortion and social imbalance, the rupture of what polis is as a community (García Cataldo, 2016, p. 51).

For Solon, the excessive desire for wealth had to be controlled, not only based on a philosophical conviction of personal moral improvement – which is also a function of the philosopher – but with the intention of preserving social peace. Remembering the Croesus case from Lydia, despite Solon's warnings about happiness, his ambition led him to pride, to underestimating the enemy, and to the collapse of his empire. In the case of the Athenians, there was a danger of breaking their society's structure with a dangerous clash of social classes, and with a decline in the number of citizens prepared with weapons to resist their enemies. Plutarch says:

> At that time, too, the disparity between the rich and the poor had culminated, as it were, and the city was in an altogether perilous condition; it seemed as if the only way to settle its disorders and stop its turmoils was to establish a tyranny. All the common people were in debt to the rich. For they either tilled their lands for them, paying them a sixth of the increase (whence they were called Hectemorioi and Thetes), or else they pledged their persons for debts and could be seized by their creditors, some becoming slaves at home, and others being sold into foreign countries. Many, too, were forced to sell their own children (for there was no law against it), or go into exile, because of the cruelty of the money-lenders (Plutarch, 1914, Solon, No. 13, p. 437).

In this way, Solon as ruler not only made speeches to convince people but also established laws to prevent destructive social inequality, implementing reforms based on ἰσονομία (equality before the law), trying to avoid a self-destructive class confrontation. His government had begun in 594 BC; three years later, in 591, he proclaimed new laws through the Athenian constitution to free poor peasants from heavy indebtedness, eliminate debt bondage, limit large properties, and somewhat curb the nobility's power by granting greater authority to all property owners. His program was framed in the concept of Εὐνομία, meaning a government oriented toward good living, with order regulated through sound legislation based on equal rights. There also emerged a body known as the Βουλή, a deliberative council of 400 citizens who handled ordinary city affairs and even held certain judicial functions.[23]

Solon thus symbolizes the beginning of an important change in the way of governing, considering the possible and terrible consequences of major social conflict. He did not overturn the entire social structure, but he established a crucial starting point with reforms designed to avoid deep inequality and the risk of civil war, "the reforms by which the legislator Solon (archon in 594–593) tried to remedy the precarious situation of large circles of the Athenian citizenry and also, in this way, to avert the alarming risk of civil war" (Gschnitzer, 1987, p. 108), thinking above all of the general interest: "it is not legitimate to imagine that Solon had the intention of overthrowing the aristocracy domination and handing over the supreme authority to the majority of the citizens body, that is, to the people" (Gschnitzer, 1987, p. 114), because "Solon's plans did not include provoking a general upheaval in the state of property; moreover, in the political field he wanted to preserve for the aristocracy its leading position" (Gschnitzer, 1987, p. 115).

A similar opinion was expressed by Aristotle, who pointed out that Solon never intended to affect the leadership role of the Areopagus or the selective election of the magistrates but, from the perspective of institutional changes, permitted democratization in the organization of the courts:

> As to Solon, he is thought by some to have been a good legislator, who put an end to the exclusiveness of the oligarchy, emancipated the people, ... The

23 In 507 BC, Cleisthenes reformed the Βουλή, increasing its membership to 500 citizens chosen by lot to serve for one year. This Βουλή preceded the ἐκκλησία, an assembly with legislative powers where any citizen could speak freely on public matters.

> council and the elected magistracy existed before the time of Solon, and were retained by him, but that he formed the courts of law out of all the citizens, thus creating the democracy (Aristotle, 1916, p. 96).

In Solon, his rejection of tyranny was clear because he did not wish to concentrate power to impose his personal will. However, he did not fulfill the expectations of all those who elected him, since it was impossible to satisfy opposing interests. In that sense, it was a question of listening to all groups equally and deciding, through laws, on directions by consensus to improve the social situation. Draco's laws were abolished, existing debts were canceled, it was ensured that no more loans would be made on the basis of enslaving people, a monetary system specific to Athens was created, interest rates were moderated to prevent usury, the Areopagus Council was retained, the magistracies were placed in the hands of the well-off, but day laborers could be selected as judges: any plebeian who had suffered an injury could present their complaint officially. Military strategists in each tribe were designated in an assembly. However, he never proposed to carry out an agrarian reform, which was one of the main demands of the poor.

In the end, Solon was seen as a moderate reformer who did not fully satisfy the different citizen groups, but the fact that he tried to give a voice to everyone places him as the first democratic attempt in Greece, especially in giving equality to all male citizens before the law (*isonomia*) and encouraging the participation of all social classes through the *Ekklesía* (ἐκκλησία: general citizens' assembly) with legislative, executive, and judicial functions, where the most important affairs of the *polis* were discussed, and also through the *Heliea*, a popular court where citizens' complaints were debated.[24] Everything was decided by a show of hands, with secret voting used only on special occasions.

> He pleased neither party, however; the rich were vexed because he took away their securities for debt, and the poor still more, because he did not re distribute the land, as they had expected, nor make all men equal and alike in their way of living, as Lycurgus did … . Solon, on the contrary, could not secure this feature in his commonwealth, since he was a man of the people and of modest station; yet

24 At that time – as throughout ancient Greece – women did not enjoy political rights. Gender equality would only enter public debate at the end of the 18th century, during the French Revolution.

> he in no wise acted short of his real power, relying as he did only on the wishes of the citizens and their confidence in him. (Plutarch, 1914, Solon, No. 16, p. 449)

Solon himself, reflecting on what had been achieved in his program of *Eunomia*, recognized his limits: "I gave the people all the part that was due to them, without depriving them of honor or exaggerating their esteem. And of those who had power and stood out for their wealth, I also took care that they should not suffer disgrace" (Solon, in García Gual, C., 1998, p. 44).

Thus, the new Athenian constitution was established, with laws to be valid for 100 years, although great debates and proposals for change continued. These laws remained publicly displayed for a long time on square wooden tablets called the Tables of the Law, which later inspired the Romans in the 5th century BC to create their XII Tables in the new Republican era after abolishing the monarchy in 509 BC with the dismissal of Tarquin the Proud.[25]

After Solon ruled Athens for a time, he left the city to travel to other regions outside Greece; he is said to have been in Egypt around 590 BC. He clearly believed that by institutionalizing *Eunomia* through the laws of the Athenian constitution, the social structure could carry forward the reforms without his presence as archon. He asked himself: "why did I withdraw before achieving what I had asked the people to do?" (Solon, in García Gual, C., 1998, p. 46); without answering clearly, he let time judge him. After several years, he returned to his city, when Pisistratus was already governing, who, despite becoming a tyrant, maintained a moderate government with many of Solon's laws still in place:

> But the people of Athens were again divided into factions while Solon was away... Such was the state of affairs when Solon returned to Athens. He was revered and honored by all, but owing to his years he no longer had the strength or the ardor to speak and act in public as before. He did, however, confer privately with the chiefs of the opposing factions, endeavouring to reconcile and harmonize them, and Peisistratus seemed to pay him more heed than the others (Plutarch, 1914, Solon, No. 29, p. 489).

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25 In mid-5th century BC Rome, the Law of the Twelve Tables was drafted. The Senate sent three magistrates to Athens to study Solon's legislation and the principle of ἰσονομία – equality of all citizens before the law.

Later, the same Plutarch clearly states that although Pisistratus represented a different form of government, "he retained most of Solon's laws, observing them first himself, and compelling his friends to do so" (Plutarch, 1914, Solon, No. 31, p. 495). In any case, Solon, due to his old age, could no longer be an influential actor in the Athenian governmental model with the capacity to reimplement the citizens' voice in assemblies. He lived out his last years as an observer and died in 558 BC.

His great wisdom would be remembered to the present day, as would his role as the first promoter of equality among citizens, fostering participation in the assemblies regarding public affairs. History remembers him as the first promoter of the democratic model in ancient Greece, although the most extensive and radical practices of that model were implemented later under Cleisthenes, with direct citizen participation in the assemblies to decide on matters of general civic interest. With good reason it can be said that Solon was the inspiration for democracy, but its practical application came later.

The first discussion on three forms of government

The social sciences, since Cicero in the 1st century BC, have recognized Herodotus (484–425 BC) as the father of history in this discipline; he was a traveler throughout the Greek world, in the regions of Persia and Egypt, and wrote the book now known as *Histories* (meaning 'investigations' in Greek), intended to remind later generations of the great significance of the Greeks' victories against the Persians.[26] All of Herodotus's work was grouped into nine books, which were titled in honor of the Muses.[27] In Book III, there is a discussion between three Persian characters from the 6th century BC – *i.e.*, Megabyzo, Otanes, and Darius –, who try to define what type of government they wanted in Persia after King Cambyses's death, when some 'wise men' (μάγοι) had seized the kingdom but had just been defeated.

The three characters represent three different proposals that were to be considered by a council of seven people – the *septemvirs* – to decide

26 According to Kapuściński (2006), Herodotus wanted to know the world and its inhabitants, to know them in order to describe them and to describe the great and wonderful deeds of both the Greeks and the 'barbarians' (p. 70).

27 The books of *Histories* are named after the Muses: Clio, Euterpe, Thalia, Melpomene, Terpsichore, Erato, Polyhymnia, Urania and Calliope. The discussion on Persian government forms appears in Book III, dedicated to Thalia, sections 79–88 (Herodotus, 2010, pp. 191–194).

the country's future, and each one began to present his proposal and reasons.

The first to speak was Otanes, who advised that the power of the state should be turned "to the Persian people" (Herodotus, 2010, p. 191), pointing out that a government of the entire people should not be left in the hands of a particular individual as a monarch, because a just government could not come from the whim of a single person:

> There can no longer be a single sovereign over us, for that is not pleasant or good... Of all men he is the most inconsistent... But the rule of the multitude has in the first place the loveliest name of all, equality, and does in the second place none of the things that a monarch does... Therefore I give my opinion that we make an end of monarchy and exalt the multitude, for all things are possible for the majority (Herodotus, 2010, p. 191).

It is interesting to note that Otanes does not speak explicitly about the concept of democracy but rather about *isonomy* (ἰσονομία), which in Greek means equality before the law: all citizens have an equal right to participate in public affairs, implying the need for assemblies and the possibility that any citizen could be elected to positions of responsibility. In fact, here the concept of *demos* (δῆμος) is clear, which will later give rise to the more widespread compound word *democracy* (δῆμος and κράτος) as the power of the people among the Greeks.

The second intervention was that of Megabyzus, who proposed the aristocracy model, which many translate also as oligarchy.[28] He began by openly contradicting Otanes's position, pointing out that although all agreed on the desire to end tyranny:

> Nothing is more foolish and violent than a useless mob; for men fleeing the insolence of a tyrant to fall victim to the insolence of the unguided populace is by no means to be tolerated. Whatever the one does, he does with knowledge, but for the other knowledge is impossible; how can they have knowledge who have not learned or seen for themselves what is best, but always rush headlong and drive blindly onward, like a river in flood?... Let us choose a group of the best

28 The concept of aristocracy as "government of the best" was preferred by Plato, Aristotle and most classical philosophers. It derives from ἄριστος (the best) and κράτος (power). *Oligarchy* is more negatively connoted today, though etymologically it simply means "rule of the few" (ὀλίγος – few; ἄρχω – to command).

> men and invest these with the power... Among the best men it is likely that there will be the best counsels (Herodotus, 2010, pp. 191–192).

Then came the third intervention of Darius, who disapproved of both Otanes's and Megabyzus's models and, therefore, wanted to justify that the government that should be chosen was monarchy:

> If the three are proposed and all are at their best for the sake of argument, the best democracy and oligarchy and monarchy, I hold that monarchy is by far the most excellent. One could describe nothing better than the rule of the one best man; using the best judgment, he will govern the multitude with perfect wisdom, and best conceal plans made for the defeat of enemies (Herodotus, 2010, p. 192).

For Darius, it seemed obvious the evil that is caused when the right to govern is given to the common people, because it greatly encourages corruption in the management of business among private individuals and, with so many involved, only public disorder is produced. He also focuses on attacking the oligarchy model, since he considers that those few will always be competing among themselves with great aversion and hatred toward each other, because each one wants to stand out and appear as the head of public resolutions. The great discords and enmities, he claims, will never be able to create a just government. His logical conclusion, comparing *isonomy* and oligarchy, is "that monarchy is best" (Herodotus, 2010, p. 192). His last argument focuses on the history of Persia:

> Where did freedom come from for us and who gave it, from the people or an oligarchy or a single ruler? I believe, therefore, that we who were liberated through one man should maintain such government, and, besides this, that we should not alter our ancestral ways that are good; that would not be better (Herodotus, 2010, p. 192).

It is interesting how the group of seven acted as a council of notables, since they held an orderly discussion among themselves and decided in their small assembly by majority vote on the monarchical model: "four of the seven men preferred the last (monarchy)" (Herodotus, 2010, p. 192). The decision was that the government should then be ruled by a monarch.

However, although the decision was made, two immediate problems remained. First, how were the minority opinions to be subordinated to the

decision of the majority? Second, how could the seven decide who among them should be the ruling king?

One might suppose that in the face of a majority decision, the minorities would be subordinated, but this was not the case with Otanes. When his proposal with the *isonomy* model failed, he immediately stated the following: although he had the right, he did not want to be considered among the candidates to rule as monarch, because he did not wish to command as a king, nor to be forced to obey as a subject. For this reason, he expressed:

> I shall not compete with you; I desire neither to rule nor to be ruled; but if I waive my claim to be king, I make this condition, that neither I nor any of my descendants shall be subject to any one of you (Herodotus, 2010, p. 193).

If this can be called a social conflict following a majority council decision, what emerges is that the rest of the *septemvirs* accepted Otanes's decision and he and his family were allowed to be autonomous and independent among the Persians, recognizing as the reason for this prerogative the fact that he had been the main author and leader of the movement to overthrow the Magi. He would remain independent but respectful of the monarchy with direct access to any matter with the elected monarch.

However, the decision of who should be the future king was left among the other members of the council, because they all felt they had the right to be. As they could not reach a consensus, they wanted to leave it to chance: "As for the making of a king, they decided that he should be elected whose horse, after they were all in their saddles in the suburb of the city, should first be heard to neigh at sunrise" (Herodotus, 2010, p. 193).

This factor of luck would also apply at many times in the democratic life of Athens, when it was desired that the responsibility of several public offices should not be determined by certain leaders or power groups but by the gods' will. What is surprising in politics and power groups is that, from then on, luck itself could be manipulated, as it can be observed in Darius's ability to be declared ruling king.

Once the decision had been made regarding the method for appointing the king, Darius spoke privately with Oebares, his astute horseman, about the possibility of manipulating fate so that the outcome would favor him. It had been agreed that one of them would become king depending on whose horse neighed first at sunrise, while all six candidates were mounted.

Darius stressed the need for strategy and ingenuity to ensure that his own horse would neigh at the right moment – he would not allow anyone else to seize the prize. As he put it, "if you have any cunning, figure out how we and no one else can win this prize" (Herodotus, 2010, p. 193).

Is it possible to manipulate fate? In politics, everything seems to be within the realm of possibility – but it is a matter of clearly identifying objectives and carefully analyzing the conditions required to achieve them. In this case, Oebares spent the entire night training Darius' horse, repeatedly bringing a mare near it in order to stimulate the stallion without satisfying it, thereby provoking its sexual instinct.

The next morning, just before dawn, the six candidates rode out into the suburbs. At the critical moment, Oebares again presented the mare to Darius' horse, which immediately neighed. This coincided with a flash of lightning in the sky, a phenomenon that further persuaded those present that the gods had selected Darius as king. "So Darius, son of Hystaspes, was made king, and the whole Asia, which Cyrus first and Cambyses after him had conquered, was subject to him" (Herodotus, 2010, p. 194). In celebration, he commissioned a marble statue of the horse, inscribed with both its name and that of the groom, Oebares.

Darius I (549–486 BC), king of Persia and father of Xerxes I, officially assumed the throne in 521 BC, following Cambyses' death and the overthrow of the Magi. Meanwhile, Athens had already undergone its own political reform under the Constitution of Solon (638–558 BC), whose legislation had alleviated the burdens of the poorer farmers – although without achieving any redistribution of land. Nonetheless, Darius' rise in Persia predated the reforms of Cleisthenes (570–507 BC), who should be recognized as the true initiator of democratic practice in Athens. While Solon's efforts laid certain foundations, it was Cleisthenes – as noted earlier – who introduced decision-making by assembly, opening the way for a model of governance fundamentally distinct from monarchy and rooted in the active participation of citizens.

From Cleisthenes to Pericles

If Solon was the earliest precursor of democratic government, it was the radical reforms of Cleisthenes in 508 and 507 BC – following a popular uprising that overthrew the ruler Hippias, who had been imposed by his

father Pisistratus in an attempt to establish a hereditary monarchy – that truly established participatory practices in Athens.

Although they ruled in different ways, Pisistratus and his sons, Hipparchus and Hippias, symbolize tyranny. This form of government was strongly criticized by Xenophon (*Hiero*: a dialogue between the tyrant Hiero and the poet Simonides), Plato (in Books VIII and IX of the *Republic*), and Aristotle (*Politics*) for concentrating power in one man and suppressing civic freedoms, making regime stability unsustainable. Thus, in Athens, the so-called Pisistratids – some more moderate than others – gave way to the practice of direct democracy (Blázquez, M., 2005).

Cleisthenes revived Solon's concept of *isonomia* (ἰσονομία), or equality before the law, and introduced a new tribal distribution that replaced kinship with local residence as the basis of political organization. The four traditional tribes based on family ties were replaced with ten territorial groups, defined not by descent but by shared locality and public life. This marked a shift toward a new culture of citizenship that moved beyond aristocratic privilege to a civic identity shaped by the *polis* – the city – where the *demos* (δῆμος) assumed a central role. Individuals were no longer known primarily by family lineage but by their city of origin: Thales of Miletus, Themistocles of Athens, Aristotle the Stagirite (from Stagira), Herodotus of Halicarnassus, Apollonius of Rhodes, Epaminondas of Thebes, Zeno of Elea, and so forth.

Cleisthenes also introduced the practice of drawing lots for public office, establishing the *Boulē* – a Council of 500 citizens representing the ten new constituencies – grouped according to coast, mountains, or urban centers.[29] Each constituency sent 50 members, and even the daily president of the assembly was chosen by lot. Although Solon had created an earlier council of 400 in 594 BC, it was Cleisthenes who developed this democratic infrastructure into a functioning *Ekklesia*.[30] The aim was that all citizens

29 Before Solon, the functions of the Βουλή were carried out by the Areopagus Council, controlled by the εὐπατρίδαι and operating in an aristocratic model. Solon is credited with institutionalizing it. Earlier precedents may include the council of Greek leaders in the Trojan War under Agamemnon – a body with only advisory powers. After Philip II's conquest of Greece, the Βουλή remained in Athens, but its membership shifted to the wealthy, mirroring developments in the Roman Senate between the 4th and 1st centuries BC.

30 For some authors, this assembly is the most important achievement of Cleisthenes, which represented a qualitative advance compared to Solon, who had only granted power to the people in the courts. "There is only one positively attested measure of Cleisthenes: the cre-

would serve at least once in their lifetime. The council had administrative, legislative, and judicial functions. Crucially, the draw – rather than election – ensured equal political opportunity and minimized elite manipulation of candidacies:

> The importance attributed to the draw reflected the consideration of each citizen as politically equal to the rest. Unlike the election, considered a typically aristocratic procedure, since it presupposed the difference between a select few and the majority, the draw implied that everyone could alternately govern and be governed, through an appropriate rotation system (Pisarello, 2011, p. 33).

Justice too became more participatory, as most civil disputes were brought before popular courts whose jurors were chosen by lot on the day of the complaint – a mechanism meant to guard against pressure and corruption.

With Cleisthenes' reforms, the *Eupatridae* (the aristocratic elite) lost much of their power, which was transferred to the citizenry. While few details survive about Cleisthenes' later governance, sources confirm that democratic institutions expanded. The *Boulē* grew, the number of magistrates and popular courts increased, and the power of the *Areopagus* was ultimately curtailed in favor of the *Ekklesia* – the assembly of citizens.

Cleisthenes, who lived from 570 to 507 BC, is recognized as the true founder of the democratic model in Athens, which would endure until 322 BC, when Macedonian forces – first under Philip II, then Alexander and his successors – dismantled the city's democratic institutions.[31] As Pisarello explains:

> The democratic period spanned about 185 years, between 507 BC and 322 BC... It developed with certain normality and was only interrupted by some isolated oligarchic uprisings, such as that of the Thirty Tyrants. The radical phase, in any

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ation of a Council of 500 people, which was to prepare the affairs of the popular Assembly" (Gschnitzer, 1987, p. 129).

31 A clear interruption of this whole democratic period came with Athens' defeat by Sparta at the end of the Peloponnesian War in 404 BC. Following its victory, Sparta dismantled the democratic model by imposing a puppet government of "thirty tyrants". However, due to its authoritarianism and violence, this pro-Spartan regime lasted only a year before being overthrown by the Athenians and their allies through direct negotiation with Sparta. Democracy was then restored in Athens.

case, of Athenian democracy, took place with the governments of Ephialtes and Pericles[32] (Pisarello, 2011, p. 33).

One of Cleisthenes' signature practices was *ostrakismos* (ὀστρακισμός), or ostracism, whereby citizens could, by vote, exile a political leader they sought to reject. This was meant to prevent tyranny and resist aristocratic dominance. As discussed below, the practice was both empowering and potentially dangerous – its principle of popular judgment evoking, in some ways, episodes like the 1968 Chinese Cultural Revolution, where mass mobilization removed and even executed Communist leaders.

After Cleisthenes, Ephialtes and Pericles played a decisive role in deepening democratic procedures during the period that followed the Persian Wars. In the early 5th century BC, Greece experienced a period of relative unity – the so-called *amphictyony* (ἀμφικτυονία), a confederation of about 70 city-states (though some of them supported Persia). This culminated in major victories: Miltiades at Marathon (490 BC), and later triumphs at Salamis (480 BC), Plataea and Mycale (479 BC).[33] As Herodotus recounts, these moments shaped the course of European history and elevated Athens to a predominant role with its democratic model but already having become an empire, soon to confront Sparta in the Peloponnesian War by the end of the 5th century.

It is said that Ephialtes, in 465 BC, was the leader of the Athens democratic party, accompanied by Pericles. Both wanted to follow the tradition started by Cleisthenes and Solon by radicalizing the practices of mass citizen intervention, and they faced opponents from the aristocratic group led by Cimon, who was opposed to these reforms. Ephialtes and Pericles are, in fact, the initiators of a more radical democratic model, promoting people's participation against the elite symbolized by the Areopagus Council. In this political confrontation, Ephialtes was assassinated in 461 BC by aristocrats, and in this way, hegemonic power in Athens passed to Pericles, who stands

32 In November 1922, the Athenian Academy – under its president Michel Skellariou – held a symposium to commemorate 2,500 years of democracy. This version of events dates the origin of Athenian democracy to 578 BC, when Solon became city archon and sought to implement the reforms laid out in the Constitution he had drafted (Hansen, 2016, p. 19).

33 At Salamis, Xerxes himself was defeated and forced to retreat to his kingdom, while Mardonius remained in Greece to continue the Persian invasion. At Plataea in Boeotia, Mardonius was killed, and in the same year the last remnants of Persian forces were defeated at the base of Mount Mycale in Ionia, near Samos. Persia thus abandoned its efforts to dominate Greece.

out as the most significant figure of this golden century – not only because of the immense power Athens accumulated, but also due to the promotion of the democratic model that was later adopted in many other cities.

> Ephialtes' reforms met with fierce resistance among the aristocracy, who plotted against him and assassinated him. His change policies were continued by Pericles, who had previously obtained the ostracism of his antagonist Cimon, head of the aristocratic party (Pisarello, 2011, p. 34).

Thus, Pericles was given the opportunity to govern Athens, and he did so for a long period of 32 years – from the assassination of Ephialtes in 461 until 429 BC, when he died from the plague that ravaged the city at the onset of the Peloponnesian War. He became the emblem of Greece's Golden Age. However, although he is considered the great symbol of the democratic model, during a time when Athens had become an empire, he sometimes ruled with almost absolute power – though, as Plutarch says, he remained focused on harmony and well-being, greatly influenced by the pre-Socratic philosopher Anaxagoras of Clazomenae.

In Athens, the opposition between two political currents continued in the 5th century: aristocrats who sought a return to power, and democrats, heirs of Solon and Cleisthenes. "There were two powerful parties in the city, that of Thucydides and that of Pericles" (Plutarch, 1914, *Pericles*, No. VI, p. 17).[34] The conflict culminated in 444 BC, when, after a vote of ostracism, Thucydides was exiled in 442 BC – just as his ally, the talented general Cimon, had been previously ostracized in 461 BC. The alliance between Thucydides and Cimon, son of Miltiades – the great hero of the battle of Marathon against the Persians –, consolidated an aristocratic group that waged a nearly 20-year political battle against Pericles, confronting two models of government. Eventually, both were politically defeated by popular power and suffered ostracism, leaving Pericles as sole hegemon.[35]

Pericles' life was a significant process of personal transformation marked by political calculation, as he himself came from an aristocratic background

34 Thucydides the politician – a leader of the aristocratic faction – must be distinguished from Thucydides the historian, author of *The Peloponnesian War*. The former had forged an alliance with General Cimon, a popular figure in Athens. Together, they represented strong opposition to Archon Pericles, seeking to undo the constitutional changes introduced by Ephialtes.

35 By 442 BC, Plutarch reports that "Thucydides was overthrown, and Pericles was entrusted with the entire control of all the interests of the people" (Plutarch, 1914, *Pericles*, No. VI, p. 17).

of great wealth, lineage, and economic power. Nevertheless, he gradually opted for the general interest of the people:

> Pericles decided to devote himself to the people, espousing the cause of the poor and the many instead of the few and the rich, contrary to his own nature, which was anything but popular ... and when he saw that Cimon was very aristocratic in his sympathies, and was held in extraordinary affection by the party of the "good and true", he began to court the favour of the multitude, thereby securing safety for himself, and power to wield against his rival. Straightway, too, he made a different ordering in his way of life. On one street only in the city was he to be seen walking, the one which took him to the market-place and the council-chamber (Plutarch, 1914, *Pericles*, No. VII, p. 19).

This idea of siding with the majority is a basic principle of democracy – especially for securing citizen support in key votes regarding city projects. In modern times, the concept of populism has often been used to explain how certain government programs for redistributing wealth are designed to attract popular sympathy toward a ruler's persona – a topic discussed further below. Several actions taken by Pericles in Athens at the time are described as follows:

> Many others say that the people was first led on by him into allotments of public lands, festival-grants, and distributions of fees for public services, thereby falling into bad habits, and becoming luxurious and wanton under the influence of his public measures, instead of frugal and self-sufficing ... with festival-grants and jurors' wages and other fees and largesses, he bribed the multitude by the wholesale, and used them in opposition to the Council of the Areiopagus (Plutarch, 1914, *Pericles*, No. IX, p. 27).

Through this strategy, the aristocrats lost their main leaders – first Cimon, and then Thucydides – and the path for Pericles' hegemonic project was cleared.

> The emulous ambition of these two men cut a deep gash in the state, and caused one section of it to be called the 'Demos,' or the People, and the other the 'Oligoi,' or the Few. At this time, therefore, particularly, Pericles gave the reins to the people, and made his policy one of pleasing them, ever devising some sort of a pageant in the town for the masses, or a feast, or a procession, amusing them like children with not uncouth delights (Plutarch, 1914, *Pericles*, No. XI, p. 35).

It is interesting to consider how personal leadership and community projects might coexist in a democratic model. It could be said that, without being a monarch, Pericles attained monarch-like powers with popular backing, during a time of political stability in Athens, decades after the Persian defeat, and in a context of economic prosperity and imperial dominance over several city-states. Owing to his musical talent, he was even said to have directed which melodies should be played on the flute or sung or played on the zither during performances. Amid such prosperity and wealth distribution, some have questioned whether, despite appearances of democratic rule, Pericles' government might have resembled one-person or aristocratic rule, especially given the concentration of decision-making – albeit ratified later by the assemblies.[36] Hansen even cites Descartes' judgment criticizing Pericles' absolute rule: "According to J.J. Rousseau, Periklean Athens was no longer a democracy, but a tyrannic aristocracy governed by savants et orateurs" (Hansen, H.H., 1992, pp. 18–19).

Another reason Pericles is remembered is for his grand public works around the Parthenon – projects of great artistic refinement and scale that elevated Athens to a place of unmatched stature in Greece and beyond, with renowned builders such as Phidias, Callicrates, and Ictinus. When critics denounced the high cost of these projects, accusing him of depleting the treasury, Pericles insisted on their necessity as civic symbols. He even declared that if the people would not accept the use of public funds, he would finance them personally. Ultimately, the people allowed the projects to proceed with public resources – not only for the enduring glory they would bring, but also for the thousands of jobs they generated. It was a strategy of distributing well-being and abundance among citizens, yet Pericles never gave in to corruption. He never stole from public funds for personal gain, and he maintained an austere lifestyle despite the vast power he accumulated.

The contemporary issue of so-called democracies in states that have become empires and attempt to export – sometimes forcibly – the electoral model to other political communities should be highlighted here. Today,

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36 These judgments remain controversial among scholars. Hansen notes that three major 19th-century historians – the Englishman George Grote, the Frenchman Victor Duruy, and the German Ernst Curtius – were all liberals who held favorable views of Athenian democracy, particularly during the age of Pericles: "The three leading historians were all liberals, and they all took a favorable view of Athenian democracy, especially democracy in the age of Perikles" (Hansen, 1992, p. 20).

some analysts reduce democracy to the single criterion of selecting rulers through elections, which was not the primary criterion in ancient Greece. In any case, Athens' hegemony in the 5th century BC, after the victory over the Persians during Pericles' time, enabled it to impose its political model on other communities. With the multitude of city-states, Athens became a prosperous city wielding imperial power – and frequently exported its governmental system to others, making 'empire' and 'democracy' converge in a single model.

By the 440s BC, "At its height in the 440's, the Athenian imperial system embraced some 150 – mainly Ionian – cities, which paid an annual cash sum to the central treasury in Athens" (Anderson, 2000, p. 41). Under the strong influence of imperial power, "Athenian tutelage generally meant the installation of democratic regimes locally, congruent with those of the imperial city itself, while the financial burden of tribute fell on the upper classes" (Anderson, 2000, p. 42), thereby gaining the support of the lower-income sectors. Empowered by this imperial dominance, "they sailed whithersoever they pleased and brought the whole sea under their own control" (Plutarch, 1914, *Pericles*, No. XX, p. 63).

Nevertheless, Athens was frequently involved in territorial disputes and commercial conflicts with other cities. At times, there was even an ambition to extend Athenian dominance to Egypt, Sicily, or Carthage. Pericles' political and military leadership must have been extraordinary to manage such a complex situation involving cities that were subjugated, allied, or hostile. He waged many military campaigns and, upon victory, imposed his own governmental model – as in the case of Samos, an island on the eastern coast of the Aegean: "Pericles set sail and broke up the oligarchical government which Samos had... treated the Samians just as he had determined, set up a democracy and sailed back to Athens" (Plutarch, 1914, *Pericles*, No. XXV, p. 75).

The causes of the long Peloponnesian War (431–404 BC) stem directly from Athens' expanding economic, commercial, and military power across Greece and its maritime dominance over the Aegean. Military conflict began in 431 BC between two blocs: Athens, heading the Delian League; and Sparta, leading the Peloponnesian League.

The war may have been avoidable. A critical moment came with the economic boom of the city of Megara, located just 40 kilometers from Athens and allied with Sparta. In 432 BC, Pericles promoted – and had approved – a

decree of economic embargo preventing Megarian citizens from entering Aegean ports. There was mediation, as King Archidamus of Sparta sought an agreement and demanded the repeal of the Megarian decree. A heated debate took place in the Athenian assembly, with some opposing war over such a reason. But Pericles' position prevailed. According to Thucydides, Athens was "a democracy in name" but in fact ruled by the will of Pericles;[37] his statement was unequivocal: "Let no one believe that we would make war for a trifle... If you give in on this, you will immediately receive other greater importance orders, because they will believe that this time you have obeyed by fear" (Pericles, quoted in Murcia, F. J., 2023).

The next event was Megara's attack on Plataea, an ally of Athens, which prompted Athenian troops to intervene. Sparta then abandoned negotiations and invaded Athenian territory, forcing rural residents to seek shelter within the city walls.

At the war's outset, Pericles died of the plague that devastated Athens due to overcrowding. This was a severe blow, as leadership passed to less capable figures such as Cleon, Alcibiades, Nicias, and the general Demosthenes – even though democratic institutions remained intact. Despite the turmoil, the Periclean period is remembered as the golden age of radical Athenian democracy, marked by frequent public assemblies making weighty decisions. Pericles' funeral oration became the emblematic tribute to this democratic ideal, delivered during the funeral rites for the first war casualties. He praised the system in which Athenians lived – one built by earlier leaders who created a novel and beneficial form of government. Pericles emphasized that the Athenians were free, no longer ruled by a few, and anyone could aspire to public office. He stressed the individual–collective link that defined the Athenian citizen:

> Our system of government does not copy the institutions of our neighbours. It is more the case of our being a model to others, than or our imitating anyone

37 According to Plutarch, one of Pericles' real motivations for going to war was a loss of popularity among citizens due to accusations of embezzlement in financing public works. He also faced attacks against Aspasia of Miletus, a foreign woman of rhetorical and philosophical distinction who had become his close companion. "The hetaira Aspasia of Miletus (470–400 BC) would come to occupy a prominent political and intellectual role" (Pisarello, 2011, p. 34). Yet, due to her gender and foreign origin, her influence was resented by many Athenians. Her name appears in the works of Plato, Xenophon and Aristophanes. Their son, Pericles the Younger, was executed after the battle of Arginusae.

> else. Our constitution is called a democracy because power is in the hands not of a minority but of the whole people. When it is a question of settling private disputes, everyone is equal before the law; when it is a question of putting one person before another in positions of public responsibility, what counts is not membership of a particular class, but the actual ability which the man possesses. No one, so long as he has I in him to be of service to the state, is kept in political obscurity because of poverty (Pericles, in Thucydides, 1916, p. 117).

Pericles spoke of a democratic model not limited to electing rulers by vote or lottery, but one in which the separation between the individual and the collective disappeared: "Here each individual is interested not only in his own affairs but in the affairs of the state as well: even those who are mostly occupied with their own business are extremely well-informed on general politics" (Pericles, in Thucydides, 1916, pp. 118–119).[38] This is why Aristotle would later define the human being as a political animal (ζῷον πολιτικόν).

Democracy thus became an ideal, a universal model. As Pericles declared, "Athens alone of the states we know, comes to her testing time in a greatness that surpasses what was imagined of her" (Pericles, in Thucydides, 1916, p. 119).

Still, the golden age of Greece came to an end with the prolonged Peloponnesian War, recounted by Thucydides. The conflict had three phases: from 431 BC to the Peace of Nicias in 421; the ill-fated Sicilian expedition (415–413); and the final phase (413–404), fought in Ionia, where Sparta – with Persian aid – defeated the Delian League. Athenian democracy was overthrown and replaced by the regime of the Thirty Tyrants. However, just a year later, in 403 BC, a popular uprising expelled them and restored the democratic regime, which formally lasted another century, until the rise of Macedon under Philip II and Alexander. Even after being defeated by Sparta, especially in the period when it ceased to be an

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38 This ancient aspiration to link individual and collective life is worth highlighting. Today, communism is frequently misrepresented as inherently evil, despite its etymological meaning referring to a shared social life with equitable wealth distribution. Historically, a parallel can be drawn with the first Christian communities after the death of Jesus Christ. As recorded in the Vulgate of St Jerome: *Multitudinis autem credentium erat cor unum, et anima una: nec quisquam eorum, quae possidebat, aliquid suum esse dicebat, sed erant illis omnia communia* (*Actus Apostolorum*, 4, 32). Democracy, in this sense, also implies ensuring that no one goes hungry or homeless: "they had everything in common".

empire in the 4th century BC, Athens continued to exercise democratic practices.

Greek democracy in the fourth century BC

With Athens' defeat in the Peloponnesian War in 404 BC, Sparta imposed an oligarchic regime of 30 tyrants who ruled despotically.[39] However, a major insurrection soon emerged and, through negotiations with the Spartans, the democratic model was restored – although it no longer retained the radicalism of previous times.[40]

Athens had been defeated, and the broader context of the fourth century BC was one of political and economic decline across the Greek world. Sparta, though apparently victorious, also suffered consequences from the Peloponnesian conflict, particularly due to the large debts it owed to the Persians – their former allies against Athens. A few decades later, Sparta clashed with the Theban general Epaminondas, whose victories undermined Spartan hegemony. Thebes triumphed at the Battle of Leuctra in 371 BC, replacing Sparta as the leading power in Greece and even invading the Peloponnese on several occasions. However, its influence waned following Epaminondas' death at the Battle of Mantinea in 362 BC, despite his side having won the engagement.

Meanwhile, Macedonian power was steadily rising – first under Philip II and later under his son Alexander. Thebes, Athens, Sparta, and all the major Greek *Polis* were eventually dominated by Macedonian generals, though many retained a degree of political autonomy until the end of the century. In contrast to this political decline, Athens experienced a flourishing of

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39 After the Peloponnesian War, Sparta imposed a puppet regime led by 30 philo-Spartans – hence their later name, the Thirty Tyrants. Their rule was marked by tyranny and repression. Their downfall was the result of a citizen-led but non-violent uprising, achieved through a strong negotiation with Sparta. Plato refers to them in multiple works, offering harsh critiques of their governance.

40 This difference in democracy during the fourth century BC, as compared to the previous one, is also attested by Momigliano: "In the Fourth Century Athens was ruled by a minority of wealthy people... The interest in democratic institutions was declining... People were more interested in private virtues and vices than in political achievements. Menander replaced Aristophanes, and *parrhesia* as a private virtue replaced *parrhesia* as a political right" (Momigliano, 1973, p. 260).

philosophical thought: with Plato establishing the Academy and Aristotle founding the Lyceum, both inheriting the intellectual legacy of Socrates. These philosophers examined the three great forms of government – monarchy, aristocracy, and democracy – and the ways in which each could degenerate into tyranny, oligarchy, and demagoguery, respectively. While monarchy prevailed through much of antiquity and well into the feudal era, Greek philosophers criticized it for centralizing decision-making in one person: if the monarch ruled wisely, good governance was possible; but if he ruled poorly, the consequences were catastrophic for society as a whole.

A broader debate remained open regarding the kinds of political systems to which societies might aspire. Beyond monarchy,

> there are two ideals of the political and social organization that oppose, 'democracy' and 'oligarchy', 'people government' and 'minority government': one was considered, generally, as a thing of the masses, the other as typical of the rich and notable (without anything alter by the fact that both sides were directed by rich and notable people) (Gschnitzer, 1987, p. 1439).

Democratic practices continued in many Greek cities throughout the fourth century BC, especially in Athens, but clearly came to an end in 322 BC – the same year Aristotle and Demosthenes died – when Alexander's generals dismantled local institutions. Nevertheless, Greek democracy left behind multiple, complex experiences of citizen participation and theoretical elaborations of government by the people. Though largely forgotten for centuries, these ideas would re-emerge in early modern Europe as alternatives to absolutist and oligarchic systems.

In Athens, democracy endured throughout the fourth century BC, both as a universal model and as a lived political experience. However, two dramatic episodes lingered in collective memory and shaped debates over the limits of radical citizen participation: the execution of military leaders in 406 BC and the sentencing of Socrates in 399 BC, both through democratic votes.

The first case involved the trial and execution of six Athenian generals during the final phase of the Peloponnesian War.[41] Eight strategoi had been dispatched to Arginusae, off the coast of Smyrna (modern-day Turkey), where they successfully defeated the Spartan fleet. However, many

41 The main sources detailing these events are Xenophon's *Hellenica* and Diodorus of Sicily's *Bibliotheca historica*.

hoplites remained stranded in wrecked ships after the battle. The generals attempted to rescue them, but a violent storm prevented them for saving the survivors. In Athens, celebrations over the victory were tempered by grief at the fate of those who had survived the battle only to die at sea. The Assembly held the generals responsible, initiating a trial. Two escaped, but the remaining six – including Pericles' son – returned voluntarily to defend themselves. Still, outrage over the lost lives prevailed. In the heat of public emotion, the Assembly sentenced them to death and promptly carried out the executions.

Socrates opposed the verdict, denouncing the political machinations of some of his compatriots. In the days that followed, many Athenians regretted the executions – questioning the generals' guilt and lamenting the loss of competent military leadership. Moreover, after Arginusae, Sparta had proposed peace, but the Assembly – still elated by its military victory – rejected the offer. These errors became painfully evident two years later when Athens suffered a decisive defeat at Aegospotami in 404 BC under the Spartan commander Lysander. The Delian League collapsed, the walls of Athens were demolished, and the city was delivered into Spartan hands.

By the fourth century BC, such experiences had sparked calls for reforms to moderate the emotional tendencies of the populace in matters of war and complex public policy.[42] Decisions in the city-state were taken by simple majority votes in mass assemblies: "All political decisions in Athens were taken by simple majority" (Hansen, 1991, p. 304). Thus, they reflected the will not of the entire demos, but of those citizens who happened to attend – often predominantly poor or illiterate.[43] While debate and rhetoric were important aspects to convince the crowd, once discussion ended, they immediately proceeded to decision making. Although Athenians generally

42 "They simply wanted to modify their Constitution and place some controls on the unlimited power of the people. The tendency of the reforms is clear: Athenians wanted to obviate a return to the political crises and military catastrophes of the Peloponnesian War… It can hardly be denied that the Athenians in the fourth century were weary of extreme 'radical' principles and were trying to set in their place if not a 'moderate', then a 'modify' democracy" (Hansen, 1991, pp. 303–304).

43 It is very difficult to know precisely the level of illiteracy among Athenians, but it is certain that there was no public education system and that private schools were few and expensive. Plutarch's *Parallel Lives* refers to an Athenian who did not know how to write the name of the person he wished to ostracize; he asked Aristides himself to write "Aristides" (Plutarch, 1821, *Aristides*, No. VII). Plutarch also provides examples of rhetorical campaigns by figures such as Themistocles – then facing ostracism – to influence voters' decisions.

trusted the judgment of the citizenry, philosophers of the fourth century began to question the ability of majorities to handle complex military or administrative decisions.

Some issues were indeed too intricate to be resolved by mass vote and could only be dealt with in small groups as they required specialized knowledge or experience available only to a few. On the other hand, some decisions were straightforward and easily swayed by popular interest, as seen in the case of Diphilos in 338 BC. Condemned to death, Diphilos left behind a fortune of 160 talents, which was to be distributed among the citizens (Hansen, 1991, p. 315). The Assembly approved his execution with speed and certainty, motivated by the opportunity to share in his fortune. Thus, popular will manifested in the execution of a wealthy entrepreneur, not necessarily for justice, but to redistribute his wealth.

On the other hand, decades earlier, in 399 BC, Plato was shocked by the decision of the Athenian legislative apparatus to condemn his teacher, Socrates.[44] The accusations against him were difficult to prove, yet a democratic majority declared Socrates guilty and sentenced him to death.

The three main accusations brought against Socrates by his accusers– Meletus, Lycon, and Anytus, the latter a prominent leader and defender of democracy – were: impiety, in the sense of disregarding the official religion; an attack on democratic institutions; and the corruption of youth through his teachings. According to Xenophon, the accusations can be expressed as follows:

> Socrates induces those with whom he talks to disregard the laws, qualifying the raffle to choose the magistrates as craziness, since no one would be willing to choose a helmsman, an architect or even a music teacher in the same way ... . Socrates could have been accused of criticizing democratic institutions during 403–399 (Hansen, 2016, p. 27).

Socrates apparently considered it absurd to use the raffle method to choose magistrates or other important state officials. Behind the charge of impiety, it seems clear that what most troubled the accusers – particularly

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44 On Socrates' persecution and death, see Plato's *Apology*, and Xenophon's *Apology of Socrates to the Jury*, as well as other scattered references. Particularly illustrative is Hansen's article "The Judgment of Socrates from the Athenian Point of View", published in *Universitas Philosophica* (Hansen, 2016, pp. 17–52).

Anytus – were perceived political offences against a democracy in the process of restoration. Historian M. H. Hansen argues that the principal accusation referred to Socrates' criticism of democratic institutions, especially as advanced by Anytus, although Meletus focused on his failure to acknowledge the city's gods and on the corruption of youth.

This raises an interesting discussion about the meaning of free expression in Greek democracy. Foucault (2019) captures this well through the term παρρησία (*parrhesia*), which implied a citizen's courage to speak their mind regardless of the danger posed by tyrannical or authoritarian power. This quality was highly admired in the Athenian political regime: "All sources show that freedom of expression was a precious ideal by Athenian Democrats" (Hansen, 2016, p. 35). However, while other defendants had been acquitted for expressing critical views on religion or politics, Socrates' case ended in condemnation. It must be remembered that this took place during the restoration of democracy after the fall of the Thirty Tyrants, and Socrates' perceived admiration for the Spartan constitution – where magistrates were selected by a limited elite – was seen in contrast to Athens, where selection was by lot.[45] His criticism of the Athenian democratic model would persist throughout the fourth century BC through the writings of Plato and Aristotle, who elaborated their own critiques of the democratic practices in Athens and other cities.

Citizen participation practices in the fourth century BC have been examined in detail by historian Hansen (1991), who notes a decline in enthusiasm for decision-making through assemblies on major matters of public policy, even though appreciation for the democratic regime itself persisted.

How did democracy evolve during the fourth century BC? Hansen (1991, p. 399) points out that while fifth-century Athenians had celebrated Cleisthenes, by the fourth century it was Solon who received the most praise – suggesting that Cleisthenes represented a more radical form of democracy. The system had shifted toward selecting magistrates from a pre-approved list, rather than by the full assembly. Solon had not given full power to the

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45 Hansen, using Xenophon's *Memorabilia,* Plato's *Gorgias,* and Aristotle's *Rhetoric* as sources, suggests: "The praise to Spartan Constitution could have been what offended Athenians and what the accusers held against Socrates during the trial... He preferred that the choice of magistrates was made by many, and said that the raffle was ridiculous" (Hansen, 2016, p. 35).

assembly to decide all matters of government, unlike in the age of Pericles, when power rested entirely with the *ekklesia*. According to Hansen (1991, p. 404), this moderate democracy reflected historical awareness – of the disastrous Sicilian expedition, the execution of six generals after the battle of Arginusae, the rule of the Thirty Tyrants imposed by Sparta, another failed war with rebellious allies in 355 BC, and finally, the total subjugation to Philip II of Macedon in 338 BC. Nonetheless, this model still allowed popular intervention until 322 BC, when, after Alexander's death, Macedonian generals abruptly dismantled all democratic institutions in Athens.

Thinkers like Plato and Aristotle favored the rule by the few over the rule by the many. Many Greek city-states were governed by oligarchs who viewed democracy as mob rule, but for politically active Athenian citizens, democracy remained a positive value: "oligarchy must wear the face of democracy if it was to be acceptable" (Hansen, 1991, p. 296).

Let us consider Plato's views in more detail:

> In Plato's opinion, democracy could be attractive because it was based on freedom. However, freedom, understood as a possibility of living without any subordination, without hierarchies, mine the social order, generates instability and promotes turbulence and confrontation between factions. According to the philosopher, the serious democracy problem is that it does not take into account the intellectual and moral incompetence of the masses. In it, the government does not entrust the experts but the crowd, and as it is invariably guided by irrational impulses, the leaders fold to their whims (Pisarello, 2011, p. 36).

In the *Republic* and *Politicus*, Plato sets out his typology of political regimes, arguing that aristocracy – or monarchy in the case of a philosopher-king – is the best form of government, as it ensures the rule of the most capable. All other forms are seen as degenerate: oligarchy involves rule by the wealthy for their own interests, while democracy grants power to the poorest, stirred by demagogues and prone to anarchy, ultimately giving rise to tyranny.

> Tyranny, Plato argues, emerges from democracy's demand for limitless freedom, which dissolves all hierarchy – not only between rulers and ruled, but between old and young, men and women, even humans and animals. The "zanganos" (drones) again become responsible for cornering the rich into self-defense, which gives rise to a people's leader who eventually accumulates absolute power. The tyrant initially appears benevolent, but soon begins eliminating the

> best citizens, reinforcing his own guard, surrounding himself with freed slaves, and ultimately enslaving the people themselves – "making them a slave of slaves (Porratti, quoted in Borón, 2000, p. 76).

At the heart of Plato's critique lies the vision of a broad mass of poor and ignorant citizens incapable of good governance because they lack civic education and values oriented to the common good. Salvation lies in the hands of virtuous rulers, of philosophers, of a well-educated aristocracy steeped in the concept of the public good—in short, in the government of the best. Hence, the central task of the state must be to educate its children and youth.

However, Plato also recognized the scarcity of true philosophers in Athens. In the myth of the cave (*Republic*, Book VII; Plato, 1991), he describes a world where most people live in darkness, while a few strive toward the light and ascend to the surface. These few, through long education – covering arithmetic, geometry, astronomy, music, and more over nearly 50 years – acquire the capacity to philosophize and rule. Thus, Plato warned of the grave danger in following the impulses of the unenlightened masses, who act from resentment and disorder. The result is pure demagogy and anarchy, as the people are swayed by fleeting emotions and immediate interests:

> Democracy comes into being after the poor have conquered their opponents, slaughtering some and banishing some, while to the remainder they give an equal share of freedom and power; and this is the form of government in which the magistrates are commonly elected by lot (Plato, 1892b, p. 263).

Clearly, with Aristotle it is evident that, based on his analysis of 158 constitutions of Greek cities, he developed a classification of three main forms of government: monarchy, aristocracy, and democracy. These could be considered pure forms of government but were prone to degeneration into tyranny, oligarchy, and ochlocracy, respectively – the latter understood as the outcome of populist demagogy that manipulates the emotions of the masses for private objectives.[46]

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46 About 200 years later, in his *Histories* – which includes the wars between Rome and Carthage in the third century BC –, Polybius coined the term ὀχλοκρατία (*ochlocracy*) to refer to the power of the mob – the impulsive rule of overflowing crowds during public assemblies. This concept may be related to "tyranny of the majority", a phrase used in the 19th century AD by Tocqueville.

Here there is an important distinction within the concept of *demos*: on the one hand, it can refer to all citizens, and on the other, to the majority of impoverished citizens – later referred to by the Romans as the *vulgo* (common people). Considering the complexity of public affairs, Aristotle did not believe that these should be entrusted to the crowd or to chance through raffles. This explains his preference for aristocracy: "Aristotle preferred a Constitution that combines aristocratic and democratic elements, making some minimum concessions to the latter, but giving primacy to the former" (Pisarello, 2011, p. 36). In his view, such a system could better prevent social conflict.

> Democracy appeared, not without reason, as a form of government that, rather than maintaining balance in power relations, sought to unbalance them to also guarantee the poor effective participation in the polis destinations. This required to sacrifice, at least at first, stability, and assume a conflict that the struggle for equality demanded (Pisarello, 2011, p. 38).

In analyzing the three principal forms of government, Aristotle expressed views like those of his teacher, Plato. He primarily focused on the comparison between two: democracy, "where sovereignty resides in all free men," and oligarchy, "where it belongs exclusively to the rich" (Aristotle, 1993, p. 163). He acknowledged the variety of social strata present in the city – farmers, artisans, merchants, mercenaries, warriors, the wealthy, and those entrusted with state management. The latter, in particular, ought to be devoted to public service and capable of leadership, especially in mediating complex confrontations between the rich – typically a minority – and the poor – generally a majority.

Aristotle pointed out that among all the constitutions he studied, in practice they all reduce to two basic types: democracy and oligarchy – though each of these could take on multiple variants. He also discussed monarchy, aristocracy, and a relatively overlooked category, the republic. Nevertheless, in his comparison of all systems, Aristotle's preference is clear. He maintained that "the government of the best" was the most desirable state form, because its defining feature was virtue – in contrast to oligarchy, which prioritized wealth, and democracy, which prioritized freedom: "Aristocracy or the government of the best, and more than any other form of government, except the true and ideal, has a right to this name" (Aristotle, 1916, p. 164). He also affirmed: "The distribution of offices

according to merit is a special characteristic of aristocracy, for the principle of an aristocracy is virtue" (Aristotle, 1916, p. 163).

It is worth emphasizing Aristotle's concept of a political regime – not merely based on how leaders are chosen, but on whether public policies influence the distribution of wealth among citizens. This leads to what is known as Aristotle's "middle-class theory," in which he sought social stability and the avoidance of violent conflict between polarized social groups:

> A city ought to be composed, as far as possible, of equals and similars; and these are generally the middle classes. Wherefore the city which is composed of middle-class citizens is necessarily best governed; they are, as we say, the natural elements of a state... the best political community is formed by citizens of the middle class, and that those states are likely to be well-administered, in which the middle class is large (Aristotle, 1916, p. 169).

This recalls a debate with clear relevance in the modern Western world, where much emphasis is now placed on defending a democratic model. Often, "democratic transition" refers simply to the end of dictatorship and the onset of electoral procedures to select leaders – yet this tends to obscure the question of the general interest, namely, the economic well-being of the people. In many Latin American countries since the late twentieth century, a sense of disillusionment with democracy has emerged. Though elections are now common, neoliberal public policy has often continued to favor economic elites, leaving the majority impoverished and the middle class shrinking. Aristotle's warnings from the fourth century BC resonate as if addressed to twenty-first-century citizens:

> Many even of those who desire to form aristocratical governments make a mistake, not only in giving too much power to the rich, but in attempting to overreach the people. There comes a time when out of a false good there arises a true evil, since the encroachments of the rich are more destructive to the state than those of the people (Aristotle, 1916, pp. 172–173).

The history of sixth-, fifth-, and fourth-century BC Greece was the age of the democratic model's emergence and development. It began moderately with Solon – who stopped short of the most radical agrarian reforms but encouraged a culture of civic equality in his constitution – and deepened with Cleisthenes. It reached its apex in the age of Pericles, marked by

political and economic strength after the defeat of the Persians. It declined during the prolonged Peloponnesian War, endured in the time of Plato and Aristotle – albeit under strong criticism of mass political participation – and was ultimately extinguished after Alexander's death, when Macedonian generals suppressed democratic institutions.

Throughout this period, monarchy was not the preferred model, and democracy generally prevailed. Yet even at the height of Athenian democracy, neither there nor in other cities did the influence of the *eupatridai* – the noble and wealthy class with oligarchic tendencies – disappear. Political tensions remained constant, manifesting in the enduring struggle between oligarchs and democrats.

The practice of ostracism

I am particularly interested in highlighting a participatory practice called ostracism, as it offers a notable example of direct citizen involvement. According to Aristotle in *The Constitution of the Athenians*, this practice was inaugurated by Cleisthenes as a popular instrument and became a tool to halt certain oligarchic leaderships that opposed democratic projects – especially when some attempted to reinstate the practices of the tyrant Pisistratus through his followers, the Pisistratidae.

The *ostrakon* (ὄστρακον) were ceramic shards easily found in neighborhoods where potters worked. A minimum of 6,000 citizens had to participate in the vote to determine whether to exile a leader aligned with the oligarchs or to choose between two political figures and expel one from the city. The process required a specific day to be designated by the leadership, upon the proposal of 50 administrative coordinators who would raise the need for a vote. A two-month period followed, during which the reasons for the vote and the profiles of the individuals involved were explained to the public. On the assigned day, each citizen acquired their own *ostrakon*, on which they wrote the name of the person to be exiled. All *ostraka* were collected at a central table.

While there were likely several instances of mass participation in such votes, the most detailed case concerns Hipparchus in 488 BCE – two years after the Greek victory over the Persians at Marathon. He was accused of defending a tyrannical model. Subsequently, two of Cleisthenes' nephews – Megacles (486 BCE) and Calixenus (485 BCE) – were also exiled through

ostracism due to suspicions of sympathizing with tyranny. Later, Xanthippus, the father of Pericles, was ostracized in 484 BCE in a similar vote.

Although democracy prevailed in Athens, oligarchic factions often sought to reinstate monarchical or aristocratic models, or at least align themselves with Spartan ideals. As a result, political tension persisted throughout the Golden Age and into the fourth century BC.

In 482 BC, a notable rivalry unfolded between Themistocles – who would later be lauded for his victory at Salamis – and Aristides, nicknamed 'the Just'. Both had previously served as archons and had frequently clashed in public debates. Themistocles, though a talented military leader, was known for his political cunning and corruption, whereas Aristides enjoyed a reputation for honesty and integrity. In the lead-up to the ostracism vote, Themistocles spread the rumor that Aristides harbored monarchic ambitions – a decisive tactic that ultimately swayed the vote.

> Each voter took an ostrakon, or potsherd, wrote on it the name of that citizen whom he wished to remove from the city, and brought it to a place in the agora which was all fenced about with railings. The archons first counted the total number of ostraka cast. For if the voters were less than six thousand, the ostracism was void. Then they separated the names, and the man who had received the most votes they proclaimed banished for ten years, with the right to enjoy the income from his property (Plutarch, 1914, *Aristides*, No. VII, p. 233).

What happened in the moments preceding the final vote? The two individuals subject to ostracism typically moved freely through the city, seeking support. Charisma and persuasive skill often determined the outcome – whether through clientelism, promises, or outright bribery. Plutarch recounts a striking anecdote:

> As the voters were inscribing their ostraka, it is said that an unlettered and utterly boorish fellow handed his ostrakon to Aristides, and asked him to write Aristides on it. He, astonished, asked the man what possible wrong Aristides had done him. "None whatever," was the answer, "I don't even know the fellow, but I am tired of hearing him everywhere called 'The Just'". On hearing this, Aristides made no answer, but wrote his name on the ostrakon and handed it back. Finally, as he was departing the city, he lifted up his hands to heaven and prayed – a prayer the opposite, as it seems, of that which Achilles made – that no crisis might overtake the Athenians which should compel the people to remember Aristides (Plutarch, 1914, *Aristides*, No. VII, p. 235).

This incident highlights that the voter was a peasant who could not read or write, relying on another person to record the name on the *ostracon* of whom he wanted to be banished. Aristides, surprised, recognized that the citizen's desire to exile him was not rooted in political disagreement but in irritation at his reputation. This suggests that political choices were not always based on rational deliberation but often on public perception and rumor. It is even possible that some illiterate voters were misled, with names written on the *ostracon* other than those they had intended.

Thus, in 482 BC, Themistocles succeeded in orchestrating a defamation campaign that led to Aristides' exile – an outcome Plutarch attributes to popular envy (Maldonado, 2016). In Aristides's case, he accepted the vote and left the city, though many later recognized the vote as a political maneuver fueled by Themistocles' envy. When the second Persian invasion began in 480 BC under Xerxes, however, Athens reversed the ostracism and called Aristides back from exile to assist in military defense, because the Persians under Xerxes had destroyed the Spartans in the Thermopylae and approached Athens to destroy the city. They forced the two opposing leaders – *i.e.*, Themistocles and Aristides – to collaborate in order to defend the city. After they defeated the Persians in Platea, Aristides withdrew from politics, not before witnessing how Themistocles, who had remained a dominant figure, was later ostracized himself in 471 BC. This was because Cimon, son of Miltiades, had emerged as another Athenian leader of the democratic current who beat him and put him in exile to remain as the only ruler.

In this context, Aristides' democratic personality is recognized by Herodotus in his *Histories* as someone honorable and honest, as Plato also does in his *Gorgias* dialogue, saying that, while, having been in many leading positions with public resources, Aristides never took something for his own benefit. This may show that a crowd popular vote does not necessarily reach fair or profitable results for the city.

Therefore, during all these processes, the moments of promotion and descent of several leaders in their relationship with the people's mood are noteworthy: Themistocles beat Aristides, but then the latter was called again to defend Athens; then Themistocles lost to the new leader Cimon, according to the people's mood. Cimon himself, who had been a great democrat, began to adopt conservative policies and even expressed his admiration for Sparta. Pericles, who was consolidating his power, accused

Cimon of Laconism and promoted another ostracism vote between them in 461 BC, where he emerged victorious and managed to exile him.

In fact, under Pericles, the Athenian Golden Age was consolidated in the 5th century BC, with all his successful actions always praising the city's democratic proceedings, but he had to fight the group of aristocrats for a long time, as Plutarch points out:

> Then the aristocrats, aware even some time before this that Pericles was already become the greatest citizen, but wishing nevertheless to have someone in the city who should stand up against him and blunt the edge of his power, that it might not be an out and out monarchy, put forward Thucydides of Alopecé, a discreet man and a relative of Cimon, to oppose him. He, being less of a warrior than Cimon, and more of a forensic speaker and statesman, by keeping watch and ward in the city, and by wrestling bouts with Pericles on the bema, soon brought the administration into even poise (Plutarch, 1914, *Pericles*, No. XI, p. 33).

In this way, Pericles was brought to another ostracism vote against Thucydides of Alopecé, who was a relative and admirer of Cimon and belonged to a conservative current. Thucydides visibly distinguished himself by sitting alongside his faction in the assembly to create a visual impact of force; however, he lost the ostracism vote in 442 BC and was banished, leaving Pericles in undisputed leadership. Unfortunately, at the beginning of the Peloponnesian War, Pericles died from the plague in 429 BC, and many leadership conflicts were unleashed in the city, causing Athens to lose many battles.

In 416 BC, the last ostracism vote took place in a dispute among three leaders: Nicias, Alcibiades, and Hyperbolus. The two stronger figures reached a secret alliance and spoke with many citizens so that, in the vote, the majority would write Hyperbolus' name to force him to leave the city. As everyone knew about this maneuver, they accompanied Hyperbolus' exit with teasing and laughter, although he felt elevated for having shared the same fate as great leaders. However, after this rigged vote, Athenians reflected on the ostracism mechanism and concluded that the method had degenerated – they resolved that this practice should be abolished from future history.

> For the time being this delighted and amused the people, but afterwards they were vexed to think that the ordinance of ostracism had been degraded by its

> application to so unworthy a man. They thought that even chastisement had its dignity, or rather, they regarded the ostracism as a chastisement in the cases of Thucydides and Aristides and such men, but in the case of Hyperbolus as an honour, and as good ground for boasting on his part, since for his baseness he had met with the same fate as the best men (Plutarch, 1914, *Nicias*, No. XI, p. 249).

When modern societies or nations want to showcase the people's participation in public affairs, the practice of direct democracy becomes very difficult due to the large number of citizens. For this reason, the Romans during the Republic invented – without calling it so – the model of representative democracy, electing delegates from various tribes because it was impossible for everyone to express their opinion individually. Therefore, direct democracy through ostracism was only feasible in Athens on specific occasions with the physical presence of citizens. Even then, it was not a perfect system: it was difficult for voters to have sufficient knowledge about those involved to make a well-informed decision regarding banishment. The heterogeneity of voters – from the most educated to the illiterate – made it impossible to have a shared, reasoned assessment of the name inscribed on each piece of pottery. Professional politicians or activists were scattered among the crowd, influencing votes in one direction or another. Illiterates who could not write had to ask others to fill in the *ostrakon*, which could result in a different name being written without their knowing. Nevertheless, the majority vote was accepted, and the chosen person had to go into exile. A final element to consider is the heightened emotion present in these popular assemblies, where the atmosphere could lead to decisions marked by tragedy.

First, I address a case in 428 BC, when the city of Mytilene, in Lesbos – an ally of Athens and part of its empire – decided to abandon the alliance. Athens responded with a military campaign, reconquered the city by force, and then deliberated in the assembly about punishing the Mytileneans. According to Thucydides, driven by revenge and outraged by the deaths of their own soldiers, the Athenians voted to execute all captured adult males and to enslave the women and children. However, a second assembly was called, where Cleon insisted on maintaining the original sentence, while Diodotus argued in favor of clemency. Fortunately, the Athenians adopted Diodotus' proposal by a slim margin. In terms of democracy, within two days the *dēmos* had made two entirely different decisions.

A second case, from 406 BC, already mentioned above but worth repeating, was decisive for Athens' defeat. Shortly before the end of the Peloponnesian War, east of Lesbos, eight Athenian generals defeated a large Spartan fleet. The city had been aided by slaves and metics. However, a storm prevented the rescue of 25 damaged triremes, and their crews drowned. Initially, the assembly celebrated and granted citizenship to slaves and metics who had participated. But upon hearing of the deaths, the same assembly summoned the eight generals for trial. Two fled, but six – including Pericles' son – trusted the people's judgment and returned. Despite having achieved a naval victory, they were accused of negligence. The people – against Socrates' advice, who presided over the assembly – voted overwhelmingly to execute them.

No one could resist the unleashed fury of the crowd. Socrates continued to try, with all his force and dialectic skill, to defend the rule of law, but even General Pericles the Younger was executed. Athens was thus left without capable military leadership for the final battles against Sparta (Chicot, 2017, p. 594).

In the final stage of the war, Athens lost the decisive battles, and in 404 BC was forced to surrender. The Spartans destroyed its city walls, eliminated the democratic system, and imposed a regime of tyrants under Spartan control. In truth, the democracy of an angry crowd often resolves immediate concerns, but not with analytical planning. In both ancient and modern times, what prevails in popular participation is what some call 'allocracy', defined as:

> The imperative need to be carried away by emotions and not by reflection when faced with problems that have complex answers. But we must also ask ourselves, at a time in history when only feelings are used, which of these are the ones that most mobilize individuals. Fear, indignation, hatred and anger are undoubtedly the most used, but also the false promise of living in a happy world in which poverty and evil do not exist. Under this false pretext, allocracy is founded (García, 2021, p. 20).

Reflection and reason are not common or widespread in the actions of crowds, either in antiquity or today. That is why it is essential to prioritize civic education from an early age – as Plato advocated in the *Republic* – and, during voting or deliberative periods, to ensure the dissemination of clear information and encourage citizens to vote not out of anger, but for the common good. I return to these ideas on reason and emotion below,

when discussing Spinoza's thought in the 17th century, as he sought to prioritize rationality while recognizing the importance of emotions in the real world of human life.

Free expression in ancient Greece

By focusing on the functioning of Athenian assemblies, it becomes clear that free speech was one of the core elements of the democratic model – but only among citizens. As previously observed, this system's validity rested on the exclusion of slaves, metics, and women.[47] Although free speech was a fundamental principle of ancient democracy, it is equally evident that a significant degree of self-censorship likely existed, especially when individuals had to speak before authorities or face the potentially enthusiastic – or violent – reaction of a crowd during majority decision-making processes.

Foucault's (2019) excellent work *Discourse and Truth: Parrēsia* offers valuable insight into the concept of *parrhesia* – a form of frank, courageous speech directed at de facto power. In such instances, considerable bravery and determination were required from citizens who voiced dissenting views on controversial matters before powerful figures. Foucault traces the multiple meanings of *parrhesia* in the works of Euripides (484–407 BC), who is the first known author to employ the term:

1. The noun *Parrhesia* (Παρρησία): frankness, free speech, *franc-parler*, *Freimüthigkeit*.
2. The verb *Parrhesiazomai* (Παρρησιάζομαι): to speak the truth, to speak freely, to say everything.
3. The subject *Parrhesiastēs* (Παρρησιαστής): the one who speaks frankly.

The *parrhesiastēs* must not be mistaken for someone who simply chatters or blurts out whatever comes to mind.[48] While the term can sometimes be

47 When praising the rise of democracy in ancient Greece, it should be acknowledged that not everyone was considered a citizen. Entire social groups – especially women – were excluded. For this reason, ancient democracy cannot serve as a model for our time. This is one of the main arguments in Giulia Sissa's *Le pouvoir des femmes. Un défi pour la démocratie* (2021), where ancient democracy is described as racist and exclusionary.

48 In contrast, Plutarch's *Moralia* includes *Concerning Talkativeness*, where he states: "It is a troublesome and difficult task that philosophy has in hand when it undertakes to cure garrulousness" (Plutarch, 1962, p. 397). Similarly, Harry Frankfurt's *On Bullshit* and *On Truth*,

misunderstood as vulgar bluntness – the inability to remain silent – Foucault emphasizes that the true *parrhesiastēs* is one who carefully considers his thoughts and their expression, even when they oppose prevailing opinions or authority. "The speaker acts on other people's minds by showing them, as directly as possible, what he thinks" (Foucault, 2019, p. 40). After reflecting upon various views, the *parrhesiastēs* arrives at his own truth and feels compelled to voice it, aiming to improve civic life.

Foucault analyses several scenes from Greek tragedies to illustrate this dynamic. In *Orestes* (Euripides), the trial concerning the murder of Clytemnestra and her lover Aegisthus presents a moment of democratic crisis. Citizens debate whether to banish, execute, or reward Orestes and Electra. When the majority leans toward execution, one voice dares to argue that the siblings should instead be honored for fulfilling divine justice – avenging their father Agamemnon, who had led the campaign to destroy Troy and was murdered by his wife and her lover, who then usurped the throne.

In *Phoenician Women*, the conflict between Eteocles and Polyneices – the sons of Oedipus – revisits the question of justice and power. The brothers had agreed to alternate rule each year, but Eteocles seized power and exiled Polyneices. What grieves Polyneices most is not merely exile but the loss of his voice in a democratic polis: "The worst is this: right of free speech does not exist" (Foucault, 2019). Similarly, in *Hippolytus*, Phaedra imagines a better future for her children in Athens, where freedom of speech would allow them to be honored: "I want my two sons to go back and live in glorious Athens, hold their heads high there, and speak their minds there like free men, honored for their mother's name" (Foucault, 2019).

In *The Bacchae*, another example emerges: a servant must report grave news to King Pentheus but fears retaliation. Before speaking, he seeks reassurance: "But first I would learn whether I may speak freely of what is going on there, or if I should trim my words". Pentheus responds by affirming a social contract based on *parrhesia*: "From me fear nothing. Say all that you have to say; anger should not grow hot against the innocent" (Foucault, 2019).

A broader reflection on democratic principles can be drawn from *The Suppliants*. The elderly king of Argos, having fought Thebes alongside the

quoting Max Black, defines *humbug* (or *paparruhxa*) as "a misleading distortion bordering on lying, especially through pretentious words or actions, of someone's ideas, feelings, or attitudes" (Frankfurt, 2013, p. 14).

bereaved mothers of Argive warriors, petitions Theseus, king of Athens, for support in securing the right to bury their dead. As previously noted, Eteocles and Polyneices perished in battle after Eteocles broke their succession pact.[49] Creon, now ruler of Thebes, allowed only the Theban dead and Eteocles to be buried, leaving Polyneices and the Argives to rot unburied. In response, the supplicant mothers seek help from Athens. Theseus, after consulting the Athenian people, leads an expedition to compel burial.

Important political conclusions from Theseus' decision to support the supplicants' appeal should be drawn here. As king of Athens, he did not act unilaterally; instead, operating within a democratic framework, he felt compelled to consult the people. He emphasized that they lived under a regime in which decisions affecting the entire community could not be made solely by the ruler. Theseus explicitly referred to the democratic model when seeking the opinion of the Athenians, affirming that every citizen was free to speak about civic matters – particularly in relation to a public decision as consequential as going to war against Thebes.

In this context, it is worth highlighting several aspects of the dialogue and confrontation between Theseus, who defends the democratic unity between ruler and citizens, and the Theban herald who arrives at the Athenian court and argues that giving a voice to the multitude is absurd when a single ruler ought to make decisions.

Theseus extols the equality that characterizes Athenian democracy, while the herald supports the rule of one man – "not of a multitude". Theseus champions the advantages enjoyed by the middle class and the right of the underprivileged to access the judicial system. By contrast, the herald denounces the people's political apathy and ignorance and criticizes those who manipulate others through rhetoric (Riera Tercero, n.d.).

It is particularly illuminating to follow this discussion in detail, observing the reflections and positions of both parties regarding the decision of a king who, aware that his actions would have consequences beyond Athens, felt compelled to deliberate and decide in conjunction with the people. Once Theseus himself is convinced that he must confront Creon, he proceeds in two stages – first by proposing dialogue and negotiation, and then by warning that, should the other party refuse, the use of force will become

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49 These events are recounted in detail in Aeschylus' tragedy *The Seven Against Thebes*, where Polyneices – son of Oedipus – and the king of Argos send an army led by seven commanders to besiege Thebes, ruled by Eteocles.

inevitable. Theseus is fully aware of both his position and his reasons – yet he understands the need to bind the people to the course of action he favors. Theseus declares:

> But I require the whole city's sanction also, which my mere wish will ensure; still by communicating the proposal to them I shall find the people better disposed. For them I made supreme, when I set this city free, by giving all an equal vote. So I will... go to their assembly, and when have won them to these views, I will return hither, after collecting a picked band of young Athenians; and then remaining under arms I will send a message to Creon, begging the bodies of the dead (Euripides, 2024).

If Thebes refuses, Theseus makes clear they will face his armed response. When a herald from Thebes arrives and asks: "Who is the despot of this land?" Theseus replies:

> Thou hast made a false beginning to thy speech, in seeking here a despot. For this city is not ruled by one man, but is free. The people rule in succession year by year, allowing no preference to wealth, but the poor man shares equally with the rich (Euripides, 2024).

The herald counters with an endorsement of monarchy: "The city, whence I come, is ruled by one man only, not by the mob; none there puffs up the citizens with specious words" (Euripides, 2024). He then questions the capacity of the people to govern: "How shall the people, if it cannot form true judgments, be able rightly to direct the state? Nay, 'tis time, not haste, that affords a better understanding" (Euripides, 2024). To this, Theseus reaffirms Athens's commitment to democracy:

> Naught is more hostile to a city than a despot; where he is, there are first no laws common to all, but one man is tyrant, in whose keeping and in his alone the law resides, and in that case equality is at an end. But when the laws are written down, rich and poor alike have equal justice, and it is open to the weaker to use the same language to the prosperous when he is reviled by him, and the weaker prevails over the stronger if he have justice on his side. Freedom's mark is also seen in this: "Who hath wholesome counsel to declare unto the state?" (Euripides, 2024).

There are numerous allusions in this text to Athenian democracy that go beyond the freedom of speech of an individual in the assembly, which is

what typically defines *parrhesia*. One essential element – largely forgotten today – is that fundamental decisions regarding government measures that affect or impact the community must be consulted with citizens; they cannot be left to the will of a single monarch. Moreover, the text evokes the idea of civic equality: both rich and poor have access to justice, thanks to a legal framework in which any citizen may appeal to resolve their conflicts. Finally, in the case of inter-polis tensions – with possible parallels to today's international framework – dialogue and negotiation must be prioritized before turning to military confrontation.

Returning to the central topic of this section, Athenian *parrhesia* developed in a context where it was possible to exercise freedom of expression, and citizens could dare to speak the truth. In this sense, a democratic society like Athens highly valued freedom of speech – especially that of individuals who, at the risk of incurring the wrath of the authorities, dared to express views contrary to political leaders or to the will of the majority.

Yet, the core problem remains: how to find truth when all citizens can hold their own opinions on public matters. In Socrates' words, "it is fundamental, and rare, to distinguish between knowledge and opinion" (Chicot, 2017, p. 454). This is why he preferred philosophy. In some respects, the Theban messenger's critique of Theseus' position has merit: the *plebs* do not necessarily possess well-reasoned and reflective opinions on political affairs, as the pursuit of truth requires deliberation, the weighing of arguments, and the prioritization of collective over individual interests. Indeed, it is not uncommon to observe assemblies in which different views and political currents clash. Still, it must be emphasized that the pursuit of truth is not equivalent to charlatanry. The *παρρησιαστής* (*parrhesiastes*, the truth-teller) speaks only after thoughtful reflection and careful consideration of differing opinions, and always with the public good as his guiding concern.

However, reason does not always prevail in democratic assemblies – neither among authorities nor citizens – and so the exercise of free speech is always fraught with danger. A vivid example is found in 479 BC, during the final confrontation between the Greek city-states and the Persian forces of Mardonius at Plataea, after Xerxes had returned to Persia following his defeat at Salamis. As Herodotus recounts, the Athenians debated their response in the assembly. Most favored war, driven by hatred of the Persians. In this tense moment, Lycydes, an Athenian citizen, dared to speak in favor of accepting Mardonius' peace offer. The assembly reacted

with fury: Lycydes was stoned to death by the crowd. When the women of Athens learned of his stance, they too took action – a mob stormed his home and murdered his wife and children.

This episode demonstrates the fragile limits of *parrhesia* even in a society that prided itself on free speech. As Michel Foucault has theorized, parrhesia may thrive in democratic Athens, but it also encountered moments of violent rejection. John Milton refers to another such moment – the case of Protagoras (485–411 BC), a renowned orator who, though often seen more as a sophist than a philosopher, was condemned for his ideas. As Milton recounts: "Thus the Books of Protagoras were by the Judges of Areopagus commanded to be burnt, and himself banisht the territory for a discourse begun with his confessing not to know whether there were gods, or whether not" (Milton, 1644, p. 5). In this way, silencing speech becomes a form of democratic repression – a danger faced by anyone who dares to speak against the passions of the crowd.

In the fourth century BC, the case of Socrates illustrates the tension between *parrhesia* and democratic governance. His life, recorded by Plato and reimagined in Marcos Chicot's historical novel *The Murder of Socrates* (2017), exemplifies the consequences of radical truth-telling. Socrates used *parrhesia* to criticize dominant figures. During the Peloponnesian War, he publicly rebuked Alcibiades despite his popularity. Later, as assembly president, Socrates refused to support the execution of the six Athenian generals, defying the enraged populace; he could not contain the fury of the crowd.

Socrates' death followed the procedures of democratic Athens. There was great discussion in the legislator's assembly; all accusations were about Socrates' ideas and opinions: corrupting the youth and not believing in the gods of the official religion. Finally, he was condemned to death by a relative majority. He was executed according to the laws of Athenian democracy itself, although it is known that the instigators of Socrates' death even went so far as to pay for votes of several legislators. As Chicot (2017) writes, "how terrible is the difference between the government of justice and the tyranny of the most convincing" (p. 585). In the case of Socrates, nevertheless, he always lived convinced of having done good throughout his existence by always trying to speak the truth, as Plato put in his mouth in the *Apology*: "from me you shall hear the whole truth" (Plato, 1892a, p. 109). And Socrates could not hold his tongue as the talked about virtue:

"I say again that daily to discourse about virtue, and of those other things about which you hear me examining myself and others, is the greatest good of man" (Socrates, in Plato, 1892a, p. 131).

Plato, disillusioned by democracy's role in his teacher's death, grew critical of its mechanisms. Socrates' case was not a criminal matter like temple robbery or treason, but an ideological trial. Accused by Meletus, Anytus, and Lycon in 399 BC, he was charged with impiety, corrupting youth, and charging fees for teaching – the last of which was false, as Socrates had criticized sophists for doing exactly that. His trial was held, and he was ultimately convicted by a majority vote in the Athenas assembly.[50] Though he could have sought forgiveness on account of his advanced age, had his sentence commuted to exile, paid a fine, or even escaped, he accepted his death sentence because the democratic procedures had been followed, and he preferred death as a transition of the soul to a peaceful state.

Importantly, Athenian-style democracy – characterized by open speech in the *ekklesia* – was not common throughout Greece. As Momigliano notes, "many of the Greek states (including Sparta) never granted such powers to assemblies and never allowed a comparable speech freedom in political meetings" (Momigliano, 1973, p. 257). Our information about the *ekklesia* pertains primarily to Athens in the fifth century BC.[51]

That century was also marked by the Persian Wars – culminating in victories at Salamis and Plataea. These were not just military triumphs but ideological ones, pitting Athenian freedom against Persian despotism. The symbolic contrast was embodied in the figure of Themistocles versus the monarch Xerxes. In his play *The Persians*, Aeschylus – the first major tragedian – wrote, "the tongue is no longer shackled," which is equivalent to freedom to say anything (*panglossia*) with an optimistic thought.[52]

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50 Majority votes – whether decided by a narrow or wide margin – were valid for democratic decisions. However, it is necessary to analyze who cast condemnatory votes, and whether they did so from conviction, hatred, clientelism, or bribery.

51 Early precedents of citizen assemblies appear in Homer's epics, which recount major political and military debates – though ultimate decisions were taken by kings. In Sparta, a council of elders wielded respected authority. Among the Macedonians, even soldiers could exercise ἰσηγορία (*isegoria* – from *isos*, "equal", and *agora*, "assembly") – the right to speak before the king. It is important to note that "the notion of freedom of speech turns out to be an Athenian fifth-century idea" (Momigliano, 1973, p. 258).

52 Although figures such as Pindar were deeply skeptical of free speech, Momigliano (1973) notes that the Greeks' freedom of expression following their triumph over the Persians

In sum, the concepts of *isegoria*, *isonomia*, and *parrhesia* are intimately linked to *eleutheria* (freedom), capturing the Athenian ideal of full liberty and equal rights within the democratic model. Yet their nuances vary. Teresa Bejan (2019) distinguishes *isegoria* as "the equal right of citizens to participate in public debates in a democratic assembly," whereas *parrhesia* is "the license to say what one pleases, how and when one pleases and to whom" (p. 97). The first belongs more properly to political participation; the second, while also political, extends into the ethical and personal lives of citizens, as Foucault (2019) clearly recognizes. In his final lectures at the Collège de France (1983–1984), Foucault describes a transformation of *parrhesia*: originally a form of political frankness exercised before an assembly, it later evolved into an ethical practice focused on *epimeleia* (ἐπιμέλεια, self-care) – what Foucault translates as *souci de soi* – a principle later adopted by figures such as Philomenus of Gadara in Epicureanism during the first century BC.

These two concepts – *epimeleia* and *parrhesia* – one as care of oneself and the other as care of others, self-government and government of others, represent, in Foucault's interpretation, an indissoluble connection. This is clearly explained by Dionisio Lozano and Delgado Rubio (2020), who propose that Foucault refers especially to *parrhesia* as the main explanatory element:

> The notion that [Foucault] will use and that will be the guiding thread of his inquiries and disquisitions will be *parrhesia*: telling the truth, speaking frankly, freedom of speech, *libertas* for Latins ... For a long time, *parrhesia* was a very powerful link between 'care for oneself' and 'care for others', between 'government of oneself' and 'government of others', a border where ethics and politics coincide (Delgado Rubio, 2020, pp. 201–202).

However, there is another aspect to be noted – one not entirely commendable, as it may become a serious flaw, error, or abuse: when nonsense is spoken both in the political sphere and in interpersonal relationships. As Momigliano states, "*parrhesia* was frequently used to mean both the virtue of frankness

stands as a significant antecedent to *parrhesia* – a concept first used explicitly by Euripides: "*Panglossia*, like *parrhesia*, denotes a readiness to utter anything ... Euripides uses *parrhesia* to mean freedom of speech ... . Aristophanes also uses it in a political sense ... Democritus says in a fragment (226D) that *parrhesia* is inherent in *eleutheria*. I conclude that in the late fifth century *parrhesia* became a popular word in Athens" (Momigliano, 1973, p. 259).

or the vice of loquacity" (Momigliano, 1973, p. 260).[53] In this regard, I have already referred to *Concerning Talkativeness* by Plutarch (1962) in *Moralia*, and the contemporary Harry Frankfurt's (1986) *On Bullshit*.

The concept of *parrhesia*, in its positive sense, began to develop multiple meanings over time – placing less emphasis on one's attitude toward political power, and more on the personal quality of reflection and the pursuit of truth. A telling example is the way the Epicurean school appropriated the concept through the philosopher and poet Philomenus of Gadara in the first century BC.[54]

Although his writings have been difficult to recover in recent centuries, much of his thinking on this topic is preserved in his text *On Parrhesia*, also known as *On Frank Judgment*.[55] Here, the Epicurean school's shift from the political to the personal becomes clear. As Braicovich observes, this marks:

> The displacement by which *parrhēsia* stops representing a 'political right' to become a 'private virtue' ... *parrhēsia* represents a (relatively institutionalized) practice that aims to heal the soul of the student through the word, through free and frank speech (Braicovich, 2017, p. 61).

In this sense, following the experience of ancient Greece – especially after the Roman Republic's transition to Empire under Octavian Augustus – one

53 In Greece itself, "in the fourth century *parrhesia* became more popular than *isegoria*. Demosthenes uses *parrhesia* 26 times against 3 or possibly 4 instances of *isegoria*; Isocrates has *parrhesia* 22 times, *isegoria* only once; Aeschines *parrhesia* 8 times, but *isegoria* once. In some of the Demosthenic speeches of doubtful authenticity *parrhesia* is most emphatically the right of the Athenian citizen" (Momigliano, 1973, p. 260).

54 Philodemus, a prolific Epicurean philosopher during the late Roman Republic, wrote on history, theology, poetry, rhetoric, and ethics. He was a passionate adherent to Epicurus' teachings, especially the pursuit of happiness through friendship and communicative exchange – key elements in achieving ἀταραξία (ataraxia), the calmness resulting from freedom from disturbance. Within the Epicurean community, *parrhesia* functioned as a liberating tool for overcoming adversity and both mental and physical turmoil.

55 Philodemus spent his final years in Herculaneum, where his library was buried by the eruption of Mount Vesuvius in 79 AD. Many carbonized papyri have since been recovered and partially read using modern technology. A student of Zeno of Sidon, Philodemus moved from Athens to Rome and ultimately to Herculaneum, where he founded an Epicurean community inspired by *The Garden* of Epicurus. He treated *parrhesia* as a pedagogical tool in the pursuit of happiness: "The strictly epistemic objective of parrhesiastic practice, insofar as what it is about to get the student to transcend the mere superficial grasp of a certain philosophical principle and reach, through the rhetorical-argumentative display of the teacher, a deep and solid understanding of the principle itself" (Braicovich, 2017, p. 69).

can observe how *parrhesia* as a political right faded with the emergence of monarchic centralization. This is the crux of Konstan's (2012) thesis on the two facets of *parrhesia*: first, as every citizen's right to participate in public life, and second, as a personal attitude, in the Epicurean sense espoused by Philomenus of Gadara:

> Once the democratic *polis* gave way to Hellenistic kingdoms, however, things changed. Life in the royal court was hierarchical, and the freedom to speak one's mind on matters of policy was strictly limited. The king might consult his council, but the ability to express one's views was a privilege, not a right. Even informal advice to a superior might be risky, if it went against his or her inclination. In this context, frankness required courage and a deep commitment to honesty (Konstan, 2012, p. 1).

Indeed, in imperial Rome, expressing critical thought – particularly when directed against the ruling regime – was dangerous. One can recall, for example, how in the 1st century AD.

> Rome during the government of the Flavians experienced a significant ideological persecution – scarcely studied – against intellectuals, known as 'philosophers', considered 'subversive' by the regime. Vespasian –in the context of his anti-Hellenic policy– issued an expulsion edict against them in 82, a measure that was repeated in 89 and 95 by his son Domitian (Hubeñák, 2008, p. 75).

It was also the era of Dio of Prusa (40–120 AD), known as Chrysostom – a prolific writer and orator who preserved the legacies of ancient thinkers in roughly 80 extant speeches. Though later in life he became an apologist for monarchy, especially under Trajan, Dio celebrated *parrhesia* as a cardinal virtue: "truth and frankness are the most agreeable things in the world" (Dio Chrysostom, 2017, p. 45). He even praised Diogenes the Cynic in an imagined dialogue with Alexander the Great, criticizing the Macedonian general's pursuit of power and wealth, and proposing an alternative form of happiness:

> Diogenes cajoled no men by flattery, but told everybody the truth and, even though he possessed not a single drachma, succeeded in doing as he pleased, failed in nothing he set before himself, was the only man who lived the life he considered the best and happiest, and would not have accepted Alexander's throne (Dio Chrysostom, 2017, p. 44).

This example showcases true freedom of speech – exercised even before the most powerful rulers. Yet, as always, in the case of *parrhesia*, courage and frankness must be tempered by *phronesis* – the Aristotelian concept of practical wisdom. One must speak at the right time, with discretion and discernment.

Hannah Arendt (2019) cites the Latin aphorism *Fiat veritas et pereat mundus*, which seems to suggest that one should always speak the truth, regardless of the consequences. Yet she warns that in politics, this phrase is often used as an excuse to withhold the truth, for fear that disclosure may be disastrous. It should instead be read with *phronesis* in mind – the recognition that while truth-telling is necessary, one must choose the right moment and context.

Lycydes, the Athenian who proposed negotiating with Mardonius before the battle of Plataea, had the courage to speak truth – but not the prudence to recognize that doing so before an enraged crowd was ill-timed. His failure to observe *phronesis* had fatal consequences. The brave might say "I speak the truth and care not for the consequences," but the wise will know when and how to speak.[56] This reflection brings us to Plato's *Republic* (1892b) and the allegory of the cave. The prisoners, chained in darkness, mistake shadows for reality. When one of them escapes and discovers the sunlit truth, he returns to share it – only to find himself rejected. What happens when the bearer of truth tries to enlighten those in chains still bound by illusion? Plato asks himself and answers:

> Men would say of him that up he went and down he came without eyes; and that it was better not even to think of ascending, and if any one tried to loose another and lead him up to the light, let them only catch the offender, and they would put him to death. No question, he said (Plato, 1937, p. 776).

Due to the habit of living in darkness, many people cannot bear the light of an alternative truth being revealed to them – and for this reason, they may react violently. As Arendt (2019) notes, perhaps the people of the cave even harbor a perverse love of imposture and falsehood. In any case, the Greek philosopher – beyond his view of the murder of his teacher

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56 A modern example: a Brazilian, celebrating a goal scored by his team during a match between Brazil and Argentina, was attacked and killed by a furious Argentine crowd – a case akin to the fate of Lycides, reflecting the dangerous emotional power of mass behavior.

Socrates by majority decision in assembly – expresses strong disapproval of governments ruled by the multitude.

Returning to the topic of truth, Araujo Silva (2012) has written an insightful article on the adage *Fiat Veritas et pereat Mundus*, applied to this specific relationship between politics and truth. He reflects on Brazil's political context at the start of the second decade of the 21st century, during the presidency of Dilma Rousseff, drawing inspiration from Arendt's text *Truth and Politics* (2019, *Verdad y Política*). In democratic societies, there is a strong demand for transparency, but the so-called Truth Commission (approved in Brazil in 2011 to clarify human rights violations between 1964 and 1988) serves as a compelling example of how the link between factual truth and historical reality can be addressed – and of the fear that the public may truly learn what the military did. In reality, "many defend the use of lies as a necessary political device" (Araujo Silva, 2012, p. 172), driven by calculations and interests of their own, while invoking the supposed ignorance of the multitude regarding political stability. This author leaves us with the question: "Is it possible to use lies to guarantee other conquests considered more noble?" (Araujo Silva, 2012, p. 172). Perhaps I cannot offer a sound affirmative or negative answer – it is necessary to recognize the complexity of the turbulent coexistence of politics and truth in today's world. What is clear is that one must possess courage and bravery to engage in *parrhesia* – but also the tact and skill to choose the right moment and formulate it appropriately.

Many elements, then, are required to exercise this frankness in speech: intelligence to discern the most consistent opinion closest to the truth; courage to express it publicly; and prudence to voice it in the proper setting, where it may have influence and persuasive force.

Historically, the power of the δῆμος was lost – not only in the use of the term but also in the capacity of the less privileged in society – in the Western world. This began with the Roman Empire (from the 1st century BC onwards), when the republican model gave way to the imperial period and was later obliterated under feudalism and its conception of divine kingship. The Catholic Church furthered this by reinforcing a vertical view of power, once Christianity became the state religion – investing authority with divine legitimacy and condemning dissenters as heretics.

Lights and shadows in Greek democracy

There is no doubt that figures such as Solon, Cleisthenes, and Pericles left a lasting legacy in Athens through their efforts to involve the people in decision-making. Hence our deep admiration for democracy as a form of government that must include the governed – not only by listening to them but by incorporating them into public decision-making. Since Solon initiated the political participation of the lower classes, the notion of limiting power to one or a few began to spread, as it was no longer acceptable for only one monarch or a few aristocrats to wield permanent control. For this reason, "the short duration of terms was implemented, along with the rotation of offices, prior examination of magistrates before taking office, and accountability ..." (Pisarello, 2011, p. 34). These mechanisms were followed by scrutiny from the assembly and the later use of ostracism to exclude undesirable individuals. Thus, it is also undeniable that Athens stands as a beacon in political history – a proposal that continues to enlighten global thought: "Democracy made the poor free, free from the unlimited domination of powerful, rich and noble, and free to decide on their own destiny" (Pisarello, 2011, p. 35). Other sources have also highlighted the virtues of this model:

> The essential principles of Greek democracy are freedom and equality; efforts were always made to ensure, as far as possible, that both prevailed in public and private life. The (in principle, ancient) Assembly right of all citizens, of what we call the 'People's Assembly' (*demos*, *ekklesía*), to make the final decision was now made as extensive as possible: not only all fundamental decisions are reserved to People's Assembly, but it now also decides, as a rule, on small, everyday problems of administration, politics and even military organization (Gschnitzer, 1987, p. 143).

Considering past and present examples of poor decisions made when authority is concentrated in a monarch or ruler – and how true tyrants have governed in various countries – it can be stated, at least in theory, that democracy is preferable to monarchy (which easily becomes tyranny) or aristocracy (which can become oligarchy). Yet this must not lead us to praise all forms of democracy blindly. A critical perspective must be adopted; for instance, recognizing that even Pericles, at times, imposed his will on the assembly through authoritarian means. Democracy can easily descend into demagoguery when it is used to bolster a leader's power.

Among the several shortcomings, perhaps the most significant concerns those who actually spoke or voted in the assemblies. Today, it is acknowledged that universal suffrage – including women – has been a hard-won, centuries-long achievement. From the late 20th to the 21st century, voter participation remains remarkably low in many democracies. Abstentionism is a serious concern. Did it exist in Athens too? It has been already established that slaves, foreigners, women, and children had no right to participate. And even among eligible citizens, few regularly attended or spoke in assemblies:

> Everyone (adult male citizens) has the right to participate. But not everyone can really attend, while for others it is very difficult; as the volume of business increases, that is, as the sessions of the Assembly multiply and simultaneously are burdened with more junk, the difficulties undoubtedly grow for many citizens, whose problem is regular participation, and the less satisfaction there is from it. The rural population was in the worst condition; only in exceptional cases could they travel the long road to the city ... But the citizens who lived in the city had other things to do, such as going to the People's Assembly every four days, even though this usually only required a relatively short period of time in the morning. Thus, it was only a small minority of citizens who normally participated in the Assemblies (Gschnitzer, 1987, p. 146).

Many leaders attempted to boost participation with fiery rhetoric, as it was understood that "not everyone participates in assemblies, and eloquence is a central quality for acquiring political influence" (Pisarello, 2011, p. 35). At certain times, citizens were even offered economic support or food and travel stipends to attend. Just as today in electoral democracies, the actual decisions were often made by minorities. In Athens, final decisions were frequently made by the common people (peasants, as Xenophon called them), who often had the least formal education. This does not deny – but helps explain – the presence of wealthy individuals who played political leadership roles. They were skilled in rhetoric, negotiation, management, and persuasion, and often tried to buy votes to further their own interests.

> These individuals who led the citizens had to carry out a democratic policy if they wanted to retain power; not infrequently it was a demagogic policy, that is, a policy practiced by such characters against an improvement in the culture degree to win the sympathies of the people and, in this way, preserve their own influential position (Gschnitzer, 1987, p. 148).

This dynamic is not unique to Athens. As Pareto (2024) argued in his theory of elites, masses do not move alone – they are mobilized by leaders and elite sectors who promote social movements aligned with their interests. Even Aristotle acknowledged this: "It is enough then that some citizens, even if they are few, want to come together so that they can constantly decide in elections" (Aristotle, 1993, p. 56). Likewise, Chicot places these words in the mouth of Cassandra: "The majority does not decide. In those madmen Assemblies where you go to, a few demagogues make the decisions and convince the majority to vote what they want" (Chicot, 2017, p. 594).[57]

However, it is necessary to emphasize the need for public discussion on fundamental community issues, even if citizens – as a multitude – may at times be swayed by the passion of the moment or by the speaker's rhetoric, especially when faced with opposing views. The case narrated by Thucydides (1916) in his *History of the Peloponnesian War*, previously discussed, exemplifies the significance of deliberation in the Athenian assembly:[58] the debate concerning the fate of the rebellious Mytileneans in 427 BC, shortly after the war had begun.[59]

Mytilene, located on the island of Lesbos, north of the Aegean Sea near the coast of modern-day Turkey, had an oligarchic government that refused to join the Delian League – the alliance led by Athens against Sparta. Confident in their prosperity, the oligarchs sought to maintain autonomy and to strengthen ties with the other cities of Lesbos (Mytilene, Antissa, Eresus, Pyrrha, and Methymna). Of these, only Methymna had a democratic government and was an Athenian ally. Nonetheless, the Mytilenean oligarchs persuaded Antissa, Eresus, and Pyrrha to build fortifications in anticipation of an Athenian attack. When word reached

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57 In a fictional dialogue, Cassandra laments: "When she was a child, it seemed to her that Assembly was a meeting of wise men, just as she thought her father was. However, since she was married to Perseus, he told her everything that happened in Assemblies, and now she had the impression that when men gathered in a crowd they became a kind of large beast, as impulsive as it was easy to manipulate." Perseus replies: "That is how democracy works" (Chicot, 2017, p. 595).

58 Momigliano affirms: "The debate between Cleon and Diodotus is not only the most profound discussion about imperialism ever held in the ancient world ... , it is also the most searching analysis of the conditions in which discussion is useful in a democracy" (Momigliano, 1973, p. 260).

59 The detailed narration of this episode appears in Thucydides' *History of the Peloponnesian War*, Book III, Chapters I, II, and IV (Thucydides, 1916).

Athens, ambassadors were dispatched to Mytilene to persuade them to halt the fortifications. Upon refusal, Athens sent a fleet of triremes and issued an ultimatum. The oligarchs rejected it once more, sending envoys to Athens to stall for time, while secretly dispatching emissaries to Sparta to request military support.

Sparta responded by sending General Salaethus as a sign of commitment. However, neither the local fortifications nor the promised Spartan aid were sufficient to withstand the Athenian assault led by General Paches. who managed to subdue Mytileneans in a total capitulation.

It was at this point that Paches requested a decree from Athenian assembly mentioning and deciding what to do with the defeated. Athens was then given the full information along with a delegation of Mytilenean oligarchs, who had been the insurrection instigators in order to negotiate clemency.

The arrested Spartan general Salaethus was immediately executed. The context was precisely the open war between Athens and Sparta, and Athenians were enraged by the Mytilenean revolt. The assembly hence decided, almost unanimously, that all Mytilene adult male citizens were to be executed while women and children were to be sold as slaves. This decree was thus issued on a trireme for General Paches to learn about and put into practice.

> Next day, however, there was a sudden change of feeling and people began to think how cruel and how unprecedented such a decision was – to destroy not only the guilty, but the entire population of a state... So an assembly was called at once (Thucydides, 1916, p. 180).

This setting gave rise to a heated debate between Cleon and Diodotus, who presented opposing arguments. Cleon, a prominent and aggressive figure, criticized the reversal of the prior decision: "I have had occasion often enough already to observe that a democracy is incapable of governing others, and I am all the more convinced of this when I see how you are now changing your minds about the Mytilenians" (Thucydides, 1916, p. 180), reproaching the assembly further: "This is the very worst thing – to pass measures and then not to abide by them" (Thucydides, 1916, p. 181).

Cleon argued that changing the decision would demonstrate democratic weakness. The Mytileneans had committed clear acts of treason by siding

with Athens' enemies and thus deserved the death penalty – both as retribution and as a deterrent against future revolts.

Diodotus then intervened. While acknowledging the gravity of the rebellion, he opposed the death sentence, stating: "I might argue that they deserve to be forgiven, but should not recommend forgiveness unless that seemed to me the best thing for the state" (Thucydides, 1916, p. 187). He advocated for calm and rational deliberation. He warned that mass executions would not prevent future uprisings; rather, they would leave rebels with no reason to surrender. It would be wiser to show some measure of mercy so that Mytilene could be reintegrated as a tribute-paying ally.

The second assembly approved Diodotus' position – though opinions remained divided. The Mytilenean oligarchs who had come to Athens seeking clemency were nonetheless executed. However, another trireme was dispatched in haste to carry the revised decree to General Paches. It arrived in time to halt the mass execution and enslavement. The island's fortifications were dismantled, and Athenian settlers were sent to occupy parts of Lesbos.

This outcome, however, was not repeated in all cases. During the assault on Melos in 416 BC – also in the context of the Peloponnesian War – the result was far more brutal. Despite Melos having declared neutrality, Athens seized the island. The assembly decided to execute all male inhabitants and enslave the women and children.[60]

The issue of genocide in history – applicable here in the ancient Greek context – has been studied extensively elsewhere, including cases with religious motivations, such as those in the Old Testament, where the Israelites, after leaving Egypt, crossed the desert and conquered what they considered to be their promised land, razing and exterminating men, women and children.[61]

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60 The *World History Encyclopedia* classifies the Athenian atrocities in Melos in 416 BC – after military conquest and an Assembly vote – as genocide, akin to Rome's destruction of Carthage in 146 BC. Known as *The Melian Dialogue*, the event concluded with the execution of all military-age males and the enslavement of women and children: "The Melians surrendered unconditionally to the Athenians, who put to death all the men of military age whom they took, and sold the women and children as slaves ... approximately 1,500 men" (Mulligan, 2013, n.p.).

61 Although some historians question the historical accuracy of biblical accounts of extermination, Konstan (2021) argues that the Bible represents not a "genocidal history, but a genocidal theology" (p. 54). Medina (2013), in *La Biblia: no se deje al alcance de los niños*, similarly highlights the persistent ideas of extermination found throughout biblical tradition.

David Konstan (2021) offers a broad examination of such motivations and the logic behind many historical massacres. What is particularly notable in the Athenian example is that such acts were not the result of an individual ruler's will or a military command – they were debated and determined in open assemblies of citizens, sometimes producing opposite outcomes.[62]

The case of Mytilene illustrates the importance of public discussion in democratic decision-making. Rhetorical argument and deliberation in the assembly made it possible to alter a prior decree – avoiding a collective massacre – even if similar processes later resulted in atrocities, as with Melos.

Thus, Greek democracy displays both its lights and its shadows, its successes and its failures. It bears striking resemblance to contemporary democratic models: electoral systems, participatory possibilities, and freedom of speech, alongside deep structural deficiencies that still fail to address many of the people's problems.

The deficiencies in the practice of democracy have led to more than 50% of citizens in Latin America expressing disappointment with the model. According to the 2023 Latinobarómetro studies, *El Economista* reports that, in many Latin American countries, the population uncomfortable with democracy is growing; on average, 54% of Latinos say that it does not matter if the government comes to power without democracy as long as it solves problems (Latinobarómetro, 2023).

The countries with the most negative perception of the democratic model are Honduras (70%), Paraguay (68%), and Guatemala (66%). In the case of Mexico, it is 56%. This disillusionment stems not only from the perception of leaders imposing themselves and manipulating the popular will, but also from the repeated failure of electoral democracies to improve people's living standards.

While numerous shortcomings and mistakes can be identified in the democratic processes practiced in ancient Greece, it is worth highlighting three positive elements that still offer valuable guidance for reimagining contemporary democratic models as desirable and worth building upon: λόγος (*logos* – reason or speech), παρρησία (*parrhesia* – speaking frankly), and φρόνησις (*phronesis* – prudence or moderation).

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62 US President Harry S. Truman ordered the atomic bombings of Hiroshima and Nagasaki on 6 and 9 August 1945, resulting in the deaths of hundreds of thousands – arguably the worst genocide in human history. Likewise, the 2003 invasion of Iraq, under President George W. Bush, with majority support from the US population, resulted in some 150,000 Iraqi deaths.

The first, *logos*, represents a turning point from μῦθος (*mythos* – attributing the shaping of nature and society to the gods through direct divine interventions) toward the search for truth through reflection, reason, and the scientific method – a legacy especially visible in the pre-Socratic phase. This marks a commitment to careful analysis of facts and the development of interpretation and judgment in the formation of opinions and decisions.

The second, *parrhesia*, reflects the essential need for citizen participation in public affairs – and also in individual life – with courage and frankness, to express truths and convictions before authorities or crowds. This virtue situates the speaker within a broader ideological struggle, acknowledging that citizens hold many diverging and even opposing views that must continuously be addressed through reasoned dialogue and open debate.

Finally, *phronesis* – which will be considered again later in connection with the Latin imperative *caute* (prudence and caution), used by Spinoza in the 17th century – is a quality that remains indispensable.[63] It allows for critical reflection on allegedly absolute truths, and more importantly, for the wisdom to discern the appropriate time, context, and method to effectively exercise freedom of expression and civic engagement.

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63 Aristotle's concept of *phronesis* is well analyzed by Rafael Valenzuela Cardona in *La Phrónesis en la política* (2014): "The Aristotelian definition of ethical virtue not only collects and synthesizes the Greek idea of just measure as a criterion of the practical life of man, but also considers, not only prudence, but the prudent man, the *phrónimos*, the man who deliberates, who projects, who has good judgment, as a rule of virtue and of the way of being that leads man to choose the good that is within his reach" (Valenzuela, 2014, p. 34).

Chapter II.

The Revival of Democracy with Spinoza in the 17th Century

> *A body politic of this kind is called a Democracy, which may be defined as a society which wields all its power as a whole. The sovereign power is not restrained by any laws, but everyone is bound to obey it in all things; such is the state of things implied when men either tacitly or expressly handed over to it all their power of self-defence, or in other words, all their right* (Spinoza, 1670, p. 205).

The idea and practice of ancient democracy had been born with Solon in the 6th century BC, but ended in 322 BC when all Greek cities were controlled by the Macedonians after Alexander's death the previous year. Later, under the Roman Republic (509–29 BC), representation was exercised through the election of members from various communities – though without employing the concept of democracy – who were controlled by Roman authority and allowed to participate in the Senate, an institution regarded as representative of the Roman people as a whole. This entire republican period was later interpreted as a form of representative democracy and served as an inspiration for its revival in the 17th century AD. This Roman experience was recorded in the 16th century by both Machiavelli (*Discourses on the First Decade of Titus Livius*) and Jean Bodin (*The Six Books of the Republic*), which are antecedents of the renewed open discussion on the forms of government in a period dominated by the absolutist state and monarchies, with little to no space for popular participation.

The purpose of this chapter is to present the resurgence of democratic thought as an explicit theoretical discussion, based on the historical experience of Holland in the 17th century, focusing especially on Baruch

Spinoza's *Theological-Political Treatise* (*TTP: Tractatus Theologico-Politicus*). Also, at the end of that century, there was the emergence of political liberalism by John Locke, which began to take shape in England under the model known as parliamentarism and liberalism – though I do not examine that development at this moment.[64]

Some authors have identified the Jesuit Francisco Suárez[65] as the father of democracy (Scannone, 1998), particularly through the content of his work *De Legibus* (*On the Laws*), in which he addressed the topic of popular sovereignty and suggested the inclusion of young people and women as part of citizenship, offering what Scannone (1998, p. 153) calls the "germ of the demand for the female vote" and emphasizing the need for a ruling monarch to have community consensus.

Hugo Grotius, on the other hand, developed natural law theory and gave central importance to *appetitus societatis*, rooted in Aristotle's *zōon politikon* (political animal), which implies an instinct to live in community under a rational order.[66] Grotius then alluded to popular sovereignty. Likewise, Johannes Althusius (1964) referred to the symbiotic members of a political community under a model of state popular sovereignty,[67] where citizens can have a tacit agreement regarding their rulers – very different from Jean Bodin's model of sovereignty centered exclusively on the monarch:

> Politics is the art through which men associate with the purpose of constituting, cultivating and preserving social life among themselves. That is why I call them symbiotic. The main subject of politics is, therefore, the association, in which the symbiotic members commit themselves among themselves, one with the other,

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64 See Medina (2014), "Politics, Democracy and Liberalism in the Origin of the Modern Era", *Revista Espiral*, University of Guadalajara, México.

65 Scannone (1998) writes of the Jesuit Francisco Suárez: "The relevance of Suárez's thought is due not only to the fact that he is considered one of the fathers of modern democracy, international law and the legitimate secularization of politics, but also because his understanding of the relationship between political and social can contribute to us today" (Scannone, 1998, p. 131).

66 Grotius writes: "Inter haec autem, quae homini sunt propria, est appetitus societatis, id est, communitatis, non qualiscumque, sed tranquillae, et pro sui intellectus modo ordinatae" (Rodríguez Molinero, 1992, p. 296).

67 Althusius's principal work, *Politica methodice digesta, atque exemplis sacris et profanis illustrata*, is available in English in Frederick S. Carney's translation. He conceived human beings as a *symbiotic community* governed by law. Althusius earned his doctorate in law in 1586 with a thesis titled *De arte jurisprudentiæ Romanæ methodice digestæ libri*. The *Johannes-Althusius-Gesellschaft* continues promoting his thought in Germany.

> through an explicit or tacit agreement, to have a type of communication about everything that is useful and necessary for a harmonious exercise of social life (Althusius, 1995, p. 17).

Thomas Hobbes himself, in the 17th century, referred to the collective power of citizens who make a pact for their own security, renouncing their own rights in order to transfer all power to the Leviathan – the State – which would then have nearly absolute capacity to impose order on a society in which *homo homini lupus* prevailed – the eternal war of man against man –, resulting in violent conflict and the war of all against all.

However, in modern times, Baruch Spinoza was the first author who explicitly advanced a democratic model as something desirable – in accordance with reason – on the basis that the thought and power of many is worth more than the thought and power of one. The central exposition of his thinking on this matter is found in his *Tractatus Theologico-Politicus* (TTP), to which I dedicate a special section in this chapter.

What does theology have to do with politics? It should be noted how many of these thinkers developed strong criticisms of the dominant theology of the Catholic and Jewish traditions – especially in the case of Catholicism, following the Council of Trent and its struggle against Protestantism in the 16th century, after the expulsion of Jews from Spain and Portugal.

Centuries earlier, Marsilius of Padua had argued that the power of popes should be restricted to the spiritual realm, without interfering in the temporal authority of monarchs – especially recalling the 1303 confrontation between Pope Boniface VIII and King Philip the Fair of France. Entering the modern era – and especially with the height of rationalism in the 17th century – the relationship between philosophy and theology had to be reconsidered. For centuries, following Thomas Aquinas, the general theory under feudalism was that philosophy and all human reasoning should be subordinate to the divine word as interpreted in Scripture. Philosophy was the *ancilla theologiae*, the servant of theology. But this subordinate relationship was challenged with the transition from feudalism to humanism and rationalism, marking a new path for democratic thought.

Context of intolerance in the 16th century

The 16th century marked a profound historical transition from feudalism to modernity – a time when human reason once again rose to confront the

theological and authoritarian power of the Catholic Church that had long upheld the Scriptures as absolute truth, superior to anything produced by human reason. Throughout the feudal era, this subjugation of reason to theology dominated, as Church and monarchy formed a powerful alliance that persecuted all forms of dissent. Any deviation from Catholic dogma was labelled heresy. In this theocentric society, ideological deviation was censored, and dissidents faced condemnation, imprisonment, and even death.

This dynamic began after Emperor Constantine converted to Christianity. In the fourth century, the Councils of Nicaea (325) and Constantinople (385) condemned the views of Arius, a priest from Alexandria who argued that Christ was not divine, but a created being. Heresies throughout the Middle Ages took various forms – Bogomils, Cathars, Waldensians, Hussites – and were all violently repressed, often through mass extermination.

A striking example is the Albigensian Crusade launched against the Cathars of southern France in the 13th century. The Cathars believed in two opposing principles: good, created by God, and evil, created by Satan. Rejecting Christ's divinity, they were targeted for annihilation; on 21 July 1209, the city of Béziers was brutally sacked. As commander Amalric reported to the Pope: "Our men left no one alive, regardless of rank, sex, or age; we killed nearly 20,000 people with the sword.[68] After the massacre, the entire city was sacked and burned" (Sibly & Sibly, 2003). King Louis IX, who upheld the persecution of heretics and led the failed Seventh Crusade (1248–1254), was later canonized by Pope Boniface VIII.

Out of this culture of intolerance, the Inquisition emerged. Rooted in the Latin *inquisitio* (to investigate), it became a religious court dedicated to identifying and punishing those who held views contrary to Catholic doctrine. Initially created in 1184 in the context of the Cathar conflict, the Inquisition expanded in the 16th century with national branches in Spain, Germany, Italy, and Austria. In Spain, Dominicans such as Gian Pietro Carafa (later Pope Paul IV) and Pedro Álvarez de Toledo intensified persecution, founding the *Index Librorum Prohibitorum* and regulating intellectual life through book censorship.

68 During the Albigensian Crusade, when a commander noted the presence of both Cathars and Catholics in a captured city, the papal legate and Cistercian abbot Arnold Amalric replied: "*Coedite eos. Novit enim Dominus qui sunt eius* [Kill them all, and God will recognize his own]." This phrase is recorded in *Dialogus Miraculorum* by Caesarius of Heisterbach (1851, p. 302). It has also been attributed to Pope Innocent III or Simon IV de Montfort.

The Protestant Reformation, symbolically begun by Martin Luther in 1517, catalysed the Catholic Church's *Counter-Reformation*, launched by Pope Paul III. Disillusioned with Rome's indulgence system – especially under Popes Alexander VI, Julius II, and Leo X – Luther publicly denounced ecclesiastical corruption in his 95 Theses, posted in Wittenberg. Protestantism gained followers throughout northern Europe, provoking the Church's reaction through the Council of Trent (1545–1563). There, with the support of Carafa and Álvarez de Toledo, Pope Paul III issued a papal bull (21 July 1542) establishing the general Inquisition:

> [He] appoints six cardinals, among the first Carafa and Toledo, commissioners of the Apostolic See and general inquisitors inside and outside Italy ... Everyone, without exception, without regard to rank or dignity, will be under his jurisdiction; the suspects will be put in prison, the guilty punished with life and their property confiscated (Ranke, 2000, p. 101).

The Inquisition employed torture and relied on secular authorities to enforce its rulings in an attempt to eradicate Protestants or anyone who wanted to differ with the Catholicism religious principles.[69] Luther died in 1546, but he had many followers such as Melanchton, Calvin, Zwingli, Jacob Arminius, among others. The consequences of the counter-reformation were precisely the persecution of all heresy and the punishment of infidels through the Inquisition.[70]

In addition, a strict system of censorship was implemented. It was decreed that no book could be printed or sold without inquisitorial approval. The *Index of Prohibited Books* became a cornerstone of this campaign:

> [In] 1543 Carafa ordered that, from then on, no book would be printed without the license of inquisitors, whatever its content, and whether old or new; booksellers had to present the books indexes to inquisitors and could not sell them without their permission, customs officers were ordered not to allow any shipment of

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69 The Council of Trent reaffirmed the following principles: salvation comes from both faith and works; Scripture and tradition are equal foundations of the Christian faith; all seven sacraments are valid (in contrast with Luther's recognition of only three); and the Virgin Mary and the saints must be venerated. The Pope was reaffirmed as Peter's successor and representative of God on Earth.

70 The Inquisition already existed in several parts of Spain prior to its official imposition by Rome across Catholic nations – particularly under Dominican influence, led by Cardinals Carafa and Juan Álvarez de Toledo.

> manuscript or printed books to pass without first presenting it to Inquisition. Little by little, the index of prohibited books was current (Ranke, 2000, p. 103).

The repression extended beyond heresy. One of the most horrifying episodes was the St. Bartholomew's Day Massacre of August 24, 1572. Under Catherine de Medici's influence, thousands of Huguenots – who were protestants – were slaughtered across France. A marriage alliance between the Protestant Henry of Navarre and Margaret of Valois served as a ruse. The massacre began in Paris, where an estimated 10,000 were killed, spreading nationwide with a final death toll around 30,000.

Another dark chapter was the witch hunts, which disproportionately targeted women accused of satanic practices, and lasted from the 15th to the 18th century. "Satanic witchcraft, which was vigorously repressed, comes from a new perception of diabolical action in this world, itself directly related to an inexpiable fight against the heresies of the 15th century" (Muchembled, 2016, p. 49). Conversely, Joseph Hansen specifies that "the first burning of a witch would have taken place in 1275" (quoted in Henningsen, 2014, p. 137), and even Henningsen (2014) goes so far as to admit that "the first, though scarce, reports date back to 1360" (p. 137). It must nevertheless be noted that "the medieval witch hunt was insignificant compared to the witch mania of the modern age" (Henningsen, 2014, p. 139). Also, Muchembled (2016) argues that "the great European witch hunt only began in 1580" (p. 67). In any case, the systematic persecution of witches intensified in the modern era, especially after 1580, during the height of the Counter-Reformation.

Inquisition accusations extended beyond theological heresy to include practices such as medicine, magic, divination, and astrology. These accusations often cited biblical authority, particularly the verse: "You shall not leave any sorceress alive" (Jerusalem Bible, 1972, Exodus 22:18).

It is estimated that in 22 European countries, over a span of three centuries, approximately 50,072 individuals accused of witchcraft were burned at the stake – 90% of whom were women.[71] The Inquisition justified this brutality by portraying women as the weaker sex, more susceptible

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71 Henningsen (2014, p. 141) estimates around 45,700 executions for witchcraft across 22 European countries, with 25,000 in the German states alone. He clarifies that the Inquisition was not solely responsible – many executions were driven by popular accusation and authorized by civil or ecclesiastical judges. An additional 50,000 people were accused but escaped execution.

to the devil's seductions, thus requiring harsher punishment for those accused of witchcraft.[72]

Although Satan appears in both the Old and New Testaments, his figure gained dramatic prominence in the High Middle Ages, especially with the rise of the Inquisition. From the 12th to the 15th century, he was increasingly depicted as an active force in the human world, seducing people into error and sin. As Muchembled notes:

> A double myth of great future was invented and slowly spread: that of the terrible Luciferian sovereign who reigns over an immense demonic army in a frightening hell of fire and brimstone and, also, that of the unclean beast crouching in the entrails of the sinner (Muchembled, 2016, p. 15).

What could have remained a theological concern was frequently politicized. Social groups and powerful individuals often used accusations of witchcraft or heresy as tools to eliminate opponents. Torture was employed to extract confessions of pacts with the devil, and executions followed. This climate of terror and intolerance persisted well into the early modern period.

Yet, paradoxically, the 16th century has also been symbolically identified as the beginning of the Renaissance – a rebirth, a new intellectual dawn. Economically, it marked the emergence of a new mode of production. Although mercantilism had originated in the 13th century, the Renaissance witnessed the rise of *homo faber*, the productive human, and the early development of wage labor. Karl Marx describes this long transformation from the feudal mode of production to capitalism, culminating in the 18th-century Industrial Revolution in England.[73]

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72 See Abril Phillips (2021), "Witch Hunt – the Dark Side of the Renaissance," who describes this as a brutal persecution "against women who deviated from the social norm and which lasted from the 16th to the 18th century" (n.p.). She also references Silvia Federici's *Caliban and the Witch: Women, the Body and Primitive Accumulation*, which reports that "those accused of witchcraft were stripped and shaved completely (it was said that the Devil was hiding in their hair), they were pricked with long needles all over their bodies – including their vaginas – in search of a mark of the Devil, they were frequently raped to investigate their virginity, and their limbs were also torn off and their bones broken" (n.p.).

73 Chapter XXIV of Volume I of Marx's *Capital* (completed in 1867), entitled *Primitive Accumulation*, explains in detail the transition from feudalism to capitalism in Europe – through land expropriation, the rise of merchants into a bourgeois class, the displacement of serfs into wage labor, and the rise of manufacturing prior to industrialization driven by the invention of transmission machinery.

The Renaissance, however, extended far beyond economics. It was an era of flourishing science, literature, painting, and political thought. Key figures such as Machiavelli, Leonardo da Vinci, Raphael, Erasmus, Giordano Bruno, Jean Bodin, Thomas More, Pomponazzi, and Paracelsus came to symbolize this transition. It was a time when reason, science, humanism, astronomy, and political critique began to challenge the authority of Church and monarchy alike.

However, this new intellectual spirit clashed with the dominant authority of the Catholic Church and the Pope – long regarded as God's representative on Earth – despite the corruption and violence of figures such as Pope Alexander VI (1431–1503) and Pope Julius II (1443–1513). The Protestant Reformation became the most significant expression of this conflict, sparking a Europe-wide struggle. It was met with the Counter-Reformation and reinforced Inquisition, aiming to preserve Catholic orthodoxy.

At its core, the conflict was philosophical and theological: could reason enjoy autonomy, or must it remain subordinated to Catholic dogma? As Ernst Bloch puts it, "philosophers and theologians could not meet again" (Bloch, 1972, p. 23). What might have been a productive exchange of ideas devolved into coercion. The Counter-Reformation and the Inquisition responded with persecution.

It is historically striking that Christianity – a religion violently persecuted by the Roman Empire during its first three centuries – would, upon becoming the official faith of feudal monarchs and emperors, adopt similar tactics of violence and repression against its own dissenters. Likewise, the Jewish institutions, whose followers had been expelled from Spain in 1492 and Portugal in 1497, later imposed their own forms of doctrinal intolerance in the relatively tolerant climate of 17th-century Holland – targeting dissident figures like Uriel da Costa, Spinoza, and Juan de Prado.[74]

Several events in the 16th century further underscore this atmosphere of violent intolerance. A particularly tragic example is the case of Thomas More. A renowned legal scholar, close confidant of Henry VIII, and a devout Catholic, More refused to support the King's marriage to Anne Boleyn

74 In contemporary times, it is often noted that after being expelled by Roman forces under Titus in 70 AD, the Jewish people were able to re-establish a state in 1948. Since then, Israel has enacted violent repression against Palestinians – displacing them from their lands and carrying out repeated attacks, which some now characterize as genocidal.

after his divorce from Catherine of Aragon.[75] His refusal – a symbolic act of resistance to the newly established Anglican rites – led to his imprisonment and eventual execution. Religious intolerance was not exclusive to Catholics; emerging Protestant powers could be equally repressive.

More is best remembered for his 1516 work *Utopia* (*Libellus vere aureus, nec minus salutaris quam festivus, de optimo reipublicae statu, deque nova insula Utopia*), which offered a visionary model for a more just and rational society.[76] This text would inspire countless utopian projects in the centuries to come – all animated by a discontent with the oppressive realities of their present and a desire for a better future.[77]

Another case at the end of that century was the execution at stake, in 1600, of Giordano Bruno (1540–1600).[78] As a young man he had joined the Dominican order, but also, due to repression of the ideas of his new philosophy, he left the habit and went as an itinerant teacher in some educational institutions in Germany; finally arriving in London, he was welcomed by Queen Elizabeth, where he began to write down his thoughts. However, heeding an invitation to Venice, he returned to Italy; there he was taken prisoner by the Inquisition, and then taken to Rome, where he spent

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75 King Henry VIII was not only notorious for beheading his friend and adviser Thomas More, but also for his six marriages. After Pope Clement VII refused to grant him a divorce from Catherine of Aragon, Henry imprisoned her in the Tower of London until her death. Anne Boleyn, his second wife, was executed for alleged witchcraft and infidelity. Jane Seymour, his third, died following childbirth. Anne of Cleves, his fourth wife, was divorced and survived. His fifth wife, Catherine Howard, was also beheaded for adultery. Only his sixth wife, Catherine Parr (1512–1548), survived him, becoming Queen Dowager.

76 *A truly golden little book, no less beneficial than entertaining, about the best state of a republic and about the new island of Utopia* – so Thomas More presents his utopian vision. Drawing on accounts of newly discovered societies, More proposed a model of coexistence with a government prioritizing public welfare.

77 See Mattelart's *History of Planetary Utopia. From the Prophetic City to Global Society* for a wide-ranging account of utopian projects from the 16th to 19th centuries: "This book is an invitation to discover the history of the search for unity in the human anthill and to revisit the republics of utopia since humanity learned that there was a fourth continent and that the Earth was shaped like a globe ... Since the Renaissance and the great discovery voyages, the desire for universal peace has stimulated the search for a space without borders" (Mattelart, 2000, p. 19).

78 Giordano Bruno's most significant work is *On Cause, Principle and One*, a dialogue asserting that the universe is animated by the same life present in humans – thus uniting us with nature. Although Bruno never opposed Christian thought, he was accused of pantheism by the Church and executed at the stake.

seven years in prison under pressure to recant his ideas. Since he persisted to the end in his conception of a god not centered on the churches or the authority of the Pope but understanding divinity as something immanent to the entire universe, he was condemned to die at the stake, which occurred on February 17, 1600. Again, intolerance of different ideas led him to become another martyr of philosophy:

> What distinguishes Giordano Bruno from all other philosophers of his time is the fact that he remained faithful to his truth until his death: after many Christian martyrs, he becomes, after Socrates, the clearest example of all the martyrs of scientific truth (Bloch, 1972, p. 24).

In the historical novel *Opus Nigrum* by Marguerite Yourcenar (2000), I have found an exposition that reflects in quite detail the transition context from this 16th century to the next, in which the rise of rationalism occurred openly with Descartes and Spinoza. Yourcenar was born in 1903 and died in 1987; she had great literary-historical skill and knowledge, which is manifested especially in the detailed explanation of the complex context of that European century, which in itself has become a transition period between feudalism and the modern era, and which was characterized by the struggle between the Reformation and the Counter-Reformation, the appearance of Renaissance and the emergence of a new mode of production. This is how the author herself synthesized it in her clarifications about the text:

> The split of what was still left – around 1510 – of the old Christianity of the Middle Ages into two theologically and politically hostile parties: the failure of Reformation, which became Protestantism, and the overthrow of what we could call its left wing; the parallel failure of Catholicism, locked for centuries within the iron corset of the Counter-Reformation; the great explorations that tend more and more towards a simple division of the world; the leap forward of the capitalist economy, associated in its beginnings with the era of monarchies (Yourcenar, 2000, p. 373).

Machiavelli's now classic work *The Prince* had appeared, which reflected the movements of royal politics in Rome, without making any allusion to God intervention. Machiavelli himself dares to say that in our world and society, 50% depends on our human actions, while the other 50% happens by chance, fortune, which consists in a series of fortuitous circumstances

that influence history without humans being able to foresee them all together. Here the question is centered on the prince or ruler's ability to manage his own and other people's actions in order to remain in power or to increase it. The discussion begins on the analysis of reason and power of political actions, which can determine the future of humanity:

> It is not unknown to me how many men have had, and still have, the opinion that the affairs of the world are in such wise governed by fortune and by God that men with their wisdom cannot direct them and that no one can even help them; and because of this they would have us believe that it is not necessary to labor much in affairs, but to let chance govern them. This opinion has been more credited in our times because of the great changes in affairs which have been seen, and may still be seen, every day, beyond human conjecture. Sometimes pondering over this, I am in some degree inclined to their opinion. Nevertheless, not to extinguish our free will, I hold it to be true that Fortune is the arbiter of one-half of our actions, but that she still leaves us to direct the other half, or perhaps a little less (Machiavelli, 2024, p. 171).

Since then, at the dawn of modern philosophy, rational thought emerges in an attempt to be autonomous from religious dogmas. In Marguerite Yourcenar's novel, *Opus Nigrum*, the story of Zeno is told, who finds himself very conflicted in this juncture of change. The character has a fundamental question: how can one combine the great tasks of human intelligence with a great freedom of thought confronted with the structures imposed for centuries in a feudal society where the Church has been the guardian and custodian of official truth expressed in theology and which labels as heretics and deviants and even condemns to the stake those who affirm or suggest other types of truths? This will be the drama of philosophical thought, especially from the 16th century onwards, when human beings feel capable of experiencing so many new things in the field of alchemy, in the healing of the sick, in the experiences of senses, in discussion about the human soul and the potential of human beings in the face of the laws and surveillance of the Church: "The rebel who rises up against his prince provokes in good people the same envious fury: their No is a vexation for their incessant Yes" (Yourcenar, 2000, p. 309).

If life and the universe are not a predestination scenario where the human being only plays a role already decided by God, the new creation of nature is perhaps a human task. What exists for Zeno is *viriditas*, a kind of *soul*

mundi, a concept of alchemy that consists in: "the innocent opening of the way of being that grows quietly in the very nature of things, a blade of life in its purest state" (Yourcenar, 2000, p. 263). This new idea also encompasses theology when it asks to what extent God acts in the world. Is he the one who imposes his desire by not letting the leaf of a tree move without his will, or maybe is humankind who, with his freedom, can act and move the world in the direction he pleases?

This remains a fundamental discussion in the religiosity of the contemporary world, where human beings can contemplate the world and societies as already made according to the will of an all-powerful God or as the product of free actions of humans who are fundamental actors in the past, present and future of the world. Thus, the prior of a monastery tells Zeno: "I have never seen God intervene directly in our earthly affairs. God delegates to us and only acts through us, poor men" (Yourcenar, 2000, p. 209). This idea can be further explored: "I said earlier that God delegates to us; I go even further ... He may be nothing more than a little flame in our hands that we have to feed, without letting it go out" (Yourcenar, 2000, p. 231).

It may be thought that this is a great praise for the beginning of rational thinking in a time of transition where everything was subordinated to the Church dogmas. Certainly, the Zeno character insists that, despite the fragility of the human body, it remains a marvelous work when he remembers everything he has experienced in many cases of dissection of cadavers; in fact, he announces the new schools of thought of the following centuries where the starting point of knowledge will be the senses' experience through the aphorism *Non cogitat qui non experitur*, because the mind has to risk discovering new inventions from observation.

In the specific field of medicine, many cures for the sick were found through experiments with herbs, potions, alchemy, among others, which gave better results than traditional medicine founded for centuries by Hippocrates and Galen. In fact, the influence of the Swiss Paracelsus (1493–1541) stands out here in a great way with all his proposals for the well-being of human health.[79]

Sometimes, one begins to have great confidence in rational thinking when it is stated that from small inventions of the human mind one can achieve a

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79 Paracelsus – doctor, alchemist, and astrologer – advanced medical ideas ahead of his time, recommending preventive health habits such as deep breathing, hydration, mindful eating, rejecting pessimism and vengeance, fostering solidarity, and cultivating silence and meditation.

better life; this is what he believes when he states that: "a mechanical brush or a self-winding coil does not mean much and, nevertheless, this chain of small discoveries could take us further than Magellan and Amerigo Vespucci went on their voyages" (Yourcenar, 2000, p. 135). However, this rational confidence will be more appropriate to the later period of the Enlightenment in the 18th century, which was not yet a firm position for the philosopher Zeno in the 16th century, because he does not believe that small or large discoveries could have served universal well-being, since factual powers have used them for destruction. For this reason, he points out:

> I have ended by cursing Prometheus for having given fire to mortals ... Nothing will remain on earth, or within it, or in the water, that is not pursued, degraded or destroyed ... Open yourself, eternal abyss, and swallow up, while there is still time, this unbridled race (Yourcenar, 2000, p. 343).

In a similar way, Zeno expresses deep concern about the future of humanity: "I have said to myself sometimes that ordering, instructing, enriching and providing instruments to our species may be nothing more than making things worse in our universal disorder" (Yourcenar, 2000, p. 137). He fears that eventually "men will kill man" (Yourcenar, 2000, p. 343), and shows little confidence in humanity's ability to act wisely in the world.

This sense of despair culminates in the novel's final episode, when Zeno is condemned to death at the stake by the Inquisition. There are no heretical positions clearly identifiable in his writings, but it was a time when "the resentment of an enemy, the moment of fury or madness of a crowd or, simply, the ineptitude of a judge, was enough to destroy guilty people who may have been innocent" (Yourcenar, 2000, p. 246). Despite the hesitation of some accusers who would have preferred a lesser sentence if he retracted certain opinions, the institutional stance of a hierarchical Church prevailed – clinging to the medieval notion of a single truth, beyond challenge or interpretation. He would executed like Savonarola, Servet, Dolet, Bruno, and many others.

The controversy over suicide remains open – as a way to avoid not just torture or the fire, but the public humiliation of a staged spectacle. On the morning of his execution, Zeno bleeds himself to death with the precision of a surgeon. Yourcenar (2000) opens the third part with a quote from Julian of Medici: "It is not villainy, nor does it come from villainy, if someone, to avoid a crueler fate, hates his own life and seeks death" (p. 297).

Still, *Opus Nigrum* offers a vision of transformation – of dissolving forms and the possibility of something better. Zeno – philosopher, doctor, alchemist – "belonged to that industrious and agitated race of men who tame fire, transform the substance of things and scrutinize the paths of the stars" (Yourcenar, 2000, p. 48). He is not governed entirely by external forces; he believes in human influence: "The stars influence our destinies, but do not decide them" (Yourcenar, 2000, p. 151).

His religiosity rejects the traditional model of divine intervention: "I profess my faith in a god who was not born of a virgin, and who will not rise again on the third day, but whose kingdom is of this world" (Yourcenar, 2000, p. 65). Predestination – as Pomponazzi also argued – is incompatible with human freedom. The potential of herbs, plants, and metals to work miracles defies rigid determinism. Viriditas, with its slow unfolding through nature, embodies that openness. Even under oppressive conditions, freedom can make life meaningful – even in the face of death: "One is only at ease when one is free" (Yourcenar, 2000, p. 119). At the end of his life, he concludes: "I have dreamed my dreams; I do not pretend that they are more than a dream... I will die a little less foolish than I was born" (Yourcenar, 2000, p. 135).

In 1600, the Italian philosopher Giordano Bruno (1548–1600) was also executed by the Inquisition. He had embraced Copernican heliocentrism and proposed that the sun was simply one star among many, with infinite worlds possibly inhabited by other beings. His vision of God was not anthropomorphic, but a cosmic force present in all things. After seven years in prison, under the authority of Cardinal Robert Bellarmine (later canonized), he was burned alive. His works were destroyed in the square in front of St. Peter's Basilica – not for any violent actions, but solely for ideas that contradicted Catholic doctrine.

The Renaissance was not only an era of creativity and rediscovery, but also of repression. Though Aristotle's writings had been recovered at the end of the Middle Ages, the ruling powers ignored one of his central ideas – *phronesis* (Φρόνησις), the wisdom of practical judgment.[80] Instead, they embraced *hybris* (ὕβρις), a pattern of excess and intolerance that refused dialogue and chose eradication.Final del formulario

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80 On *phronesis* as political prudence, see Valenzuela Cardona (2014), *Phronesis in Politics. Origins of the Aristotelian Concept of Prudence*. This work remains relevant today, especially regarding excesses in political power and the suppression of criticism and dissent.

Rationalism in the 17th century

The 17th century is often described as the great age of rationalism, marked by the works of Descartes, Spinoza, and Leibniz. Yet the shadow of intolerance remained. Political power lay in the hands of absolute monarchs, and no form of *demos* with genuine *kratos* appeared on the horizon. Religion continued to underpin domination, both through the feudal lords and the institutional Church.

One of the early tensions emerging from the collapse of feudalism was the Church's claim to supremacy over kings. This played out in the 1303 conflict between Pope Boniface VIII and Philip the Fair of France. Marsilius of Padua's *Defensor Pacis* responded to this conflict by arguing that the Church's domain was spiritual and should not intrude on the affairs of temporal governance. Later ruptures followed – most notably, Luther's Reformation, which promoted direct interpretation of Scripture, and the revival of natural sciences, especially Copernicus' heliocentric theory, which challenged Scriptural cosmology.

At the core of these conflicts was the confrontation between theology and philosophy, between faith and reason. If *ratio* – reason – is a divine gift, could it not lead to truths that differ from Church dogma? The Church's answer, delivered forcefully through the Council of Trent and the institutionalization of the Inquisition, was to assert the primacy of theology and persecute dissent.

The new century thus continued in the same intolerant vein. Bruno was executed; Galileo was tried and forced to recant. Rationalism may have risen, but repression remained. Thinkers who used reason to examine society found themselves under threat.

Francisco Suárez, a Jesuit, denied that the Pope held supreme spiritual or civil power and rejected the idea that papal authority extended directly over temporal rulers. His *Defensio Fidei* was burned in both London and Paris. Hobbes' *Leviathan* was also censored for perceived atheism. Spinoza was expelled from the synagogue for denying that the Torah held authority over reason and philosophical reflection.

George Sabine (1939) noted that the 6th century BC in Greece marked the first explosion of rational political thought – the shift from *mythos* to *logos*. The old belief in divine forces directing nature and society gave way to rational explanations. But the scientific method of the pre-Socratics was abandoned for centuries under Roman rule and feudalism. Only with the

17th and 18th centuries did a new wave of rational thought return, aiming to explain the world without divine intervention.

This second historical phase of rationalism provoked new conflicts, especially with religious institutions that refused to accept, for example, the heliocentric model proposed by Copernicus, Kepler, and Galileo – a universe no longer Earth-centered.

In political theory, Spinoza stands out among the rationalists. A descendant of Portuguese Sephardic Jews, his family had settled in Amsterdam – then a major economic hub and a relatively tolerant city. For a time, it was governed by Jan and Cornelis de Witt, advocates of a liberal and commercial aristocracy. Jan de Witt, in particular, was a central figure. Albiac (2018) puts it plainly: "Jan de Witt invented modern democracy. He imposed it in Amsterdam during the most splendid years of the city and of Europe in the 17th century" (p. 116). Spinoza supported that model without hesitation.

The tragedy of Uriel da Costa

Spinoza belonged to the Jewish religion, which eventually excommunicated and expelled him – in a gesture that echoed the logic of the Counter-Reformation and revived some of the Inquisition's methods. A significant precedent in this regard was the life and death of Uriel da Costa (1585–1640), born in Oporto, Portugal, and deceased in Amsterdam.

Da Costa descended from Jews expelled from Spain in 1492 who later settled in Portugal. As the Portuguese monarchy followed the Spanish model of Catholic uniformity, many Jews were forced to leave or convert. Like many others, da Costa's family became *marranos* – converts to Catholicism who continued to practice Judaism in secret. These converts were subject to scrutiny and persecution by the Inquisition, which aimed to uncover and punish hidden heresy.

Raised as a Catholic, Uriel da Costa studied theology at the University of Coimbra and held religious office, including as treasurer of a cathedral. He struggled with dogmas concerning the resurrection and eternal punishment. Gradually, his reason began to clash with the tenets of Christian belief. He could not reconcile, for example, the claim that Mary gave birth while remaining a virgin, the mystery of the Trinity, or the miracles attributed to Christ.

Eventually, disillusioned with Catholicism and fearful of persecution, he fled to Amsterdam with his family in search of religious freedom. Adopting the name Uriel, he formally embraced Judaism and was circumcised. As Bayle notes: "He did not want to accept the decisions of the Catholic Church because he did not find them in accordance with reason, and he embraced Judaism because he found it more in accordance with his own lights" (quoted in Albiac, 2018, p. 250).

However, da Costa soon encountered similar problems within Judaism. He questioned the parting of the Red Sea, Moses' execution of idolaters, and other miraculous accounts. Above all, he remained preoccupied with the soul's immortality and the afterlife – questions he found unresolved in the Torah. Over time, he began to voice his critiques publicly.

Ironically, Amsterdam's Jewish community – refugees from persecution – began to replicate the mechanisms of orthodoxy and exclusion. Like the early Christians who, once legalized under Constantine, turned on their pagan adversaries, the Jews of Amsterdam created their own forms of repression. As Pollock observed:

> It is a general fact in human history, and one of the saddest, that no sooner has a persecuted community secured its freedom, than it takes to persecuting in its turn. This was shown at the very same time by the Reformed Church of the Netherlands (Pollock, 1899, p. 8).

The analogy extends to more recent history: the creation of the State of Israel in 1948, following the Shoah, gave rise to a nation that would later engage in violent repression of the Palestinian people – a reminder of how victimhood does not preclude the exercise of repressive power against adversaries.

Da Costa's open rejection of resurrection and other dogmas led to his excommunication in 1618. In 1624, he published a work denying the immortality of the soul; it was censored, and he was fined heavily. He endured isolation for years, until finally, desperate for reconciliation, he requested readmission. The community imposed harsh conditions: public retraction, flogging, and ritual humiliation. Stripped to the waist and tied to a column, he was lashed thirty-nine times, then forced to lie prostrate at the synagogue's entrance so that congregants could trample him. Spinoza, then eight years old, may have been among them. Humiliated, da Costa

returned home, wrote a brief autobiography titled *Exemplar Humanae Vitae* (Model of a Human Life), and then took his own life with a pistol – after reportedly attempting to kill the man who had denounced him.[81]

His story exemplifies the confrontation between reason and religious dogma, not only within Christianity but also in Judaism. Hierarchical orthodoxy sought to silence dissent through censorship, excommunication, and isolation. Da Costa fled Portugal to escape the Inquisition, only to find its logic reproduced in Amsterdam – and paid for it with his life.

The republican experience of the Netherlands in the 17th century

The Netherlands in the 17th century is often referred to as a golden age – not only for its commercial and economic expansion but also for its distinct model of government, which stood apart from the dominant trend of European absolutism. This was the same century in which England experienced its own transformation: the execution of Charles I, the rise of Cromwell, and ultimately, the establishment of a parliamentary monarchy – a development that would influence John Locke's liberal political theory.

Originally under Spanish rule during the Habsburg reign of Charles V, the Dutch territories began to assert their independence under the Calvinist leadership of William the Taciturn (William I of Orange or William the Silent). The Union of Utrecht in 1579 marked the formal beginning of the United Provinces (Friesland, Groningen, Gelderland, Overijssel, Utrecht, Zeeland and Holland).[82] The protracted Eighty Years' War with Spain also began, culminating in the Peace of Westphalia in 1648, where Dutch independence was finally recognized – though the southern provinces remained under Spanish control until 1656.

The Dutch golden age had earlier roots: in 1602, the founding of the Dutch East India Company, followed by the creation of the Bank of Amsterdam in 1609, laid the foundations of a thriving mercantile economy.

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81 Pollock recounts a tragic end: "Having completed this writing, he shot himself in his own house after an unsuccessful attempt on the life of his chief enemy" (Pollock, 1899, p. 9).

82 In the Republic of the Seven Provinces, Holland was the dominant state, and its name became internationally representative of the Netherlands. Nonetheless, the term *Netherlands* remains the proper synonym.

Inspired by thinkers like Hugo Grotius,[83] the Netherlands advanced a vision of open trade at a moment when Europe was shifting from mercantilism to early capitalist manufacturing. The independence of the Netherlands United Provinces was not recognized until the Peace of Westphalia in 1648, but its economic boom had begun since the beginning of the century.

As elsewhere in Europe, the 17th century also saw internal struggles between monarchical and republican visions of governance. In the Dutch case, monarchists sought a centralized state under the authority of the *Estatuder* (*Stadtholder*)[84] in The Hague – typically drawn from the House of Orange – and aligned with orthodox Calvinism. Republicans, in contrast, championed the authority of the *Grand Pensionary*, an office that represented the merchant class and supported provincial autonomy in a federal structure. While the monarchical side tended toward intolerance, the republican current promoted dialogue and relative religious tolerance. Nevertheless, these tensions periodically erupted. In 1619, Johan van Oldenbarnevelt – a leading republican – was accused of treason by the Orangists and executed. This occurred after the Synod of Dordrecht (1618–1619), where the strict Calvinist Gomarists prevailed over the more moderate Arminians.

The growing centralism of Stadtholder William II provoked an uprising that culminated in his death in 1650. This opened the way for republican governance under the Grand Pensionary, who presided over both the provincial assemblies and the States General. The most influential figure to hold this office was Jan de Witt, who served from 1653 to 1672. His administration marked a high point in Dutch republicanism. However, following the Franco-Dutch War and internal unrest, the Orangists returned to power. The De Witt brothers were brutally murdered in 1672, and William III of Orange reasserted monarchical control.

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83 Among Grotius' many works, *De Iure Belli ac Pacis* and *Mare Liberum* are especially notable for laying foundations of international law and free trade. In *Mare Liberum* (Chapter XII of *De Indis*, 1609), Grotius asserts that the seas are not private property and must remain open for navigation and commerce. His liberal stance clashed with Calvinist authorities, leading to his imprisonment in 1618. He escaped in 1621 and published *De Iure Belli ac Pacis* in Paris in 1625.

84 The *Stadtholder* of Holland was originally the Spanish king's lieutenant in the region, often a noble. In the 17th century, the office was monopolized by the House of Orange. Following the 1672 French invasion and the fall of Jan de Witt's government, the Orange line – through William III – resumed leadership.

Despite these reversals, the De Witt era saw the Netherlands become the nexus of global trade, connecting Europe with the colonies of the New World in the Americas,[85] Ceylon, India, and Indonesia. This prosperity benefitted broad sectors of society, attracting waves of immigrants. The Peace of Münster in 1648 – part of the broader Westphalia treaties – recognized the Netherlands' sovereignty and formalized a federal system: a central States General governing over autonomous provinces.

While Calvinism was the dominant religion, the republic was notable for its tolerance. Jews, Huguenots, Jansenists and other minorities found relative freedom in cities like Amsterdam. It was this tolerant climate that drew families like that of Spinoza and Uriel da Costa to the Netherlands, escaping the persecutions of Spain and Portugal.

The De Witt administration embodied a liberal, urban republicanism that would later resonate in Enlightenment political thought. Jan de Witt's friendship with Spinoza – who praised the Dutch republic for its liberty – was emblematic of the era: "Seeing that we have the rare happiness of living in a republic, where everyone's judgment is free and unshackled, and where freedom is esteemed before all things dear and precious" (Spinoza, 1670, p. 6).[86]

Amsterdam became a hub not only for commerce but also for ideas. Descartes lived there between 1629 and 1649, producing the *Meditations*. John Locke visited the city before the Glorious Revolution of 1688. Leibniz also travelled there and met with Spinoza before his death. Spinoza himself, inspired by the republican experiment, became one of the first modern philosophers to propose democracy as the most rational form of government.

The De Witt brothers were born in Dordrecht into a prosperous and well-educated family committed to Roman republican ideals – the *res publica*. Jan de Witt studied law and mathematics at the University of Leiden and earned

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85 The city now known as New York was originally New Amsterdam, a Dutch settlement. It was renamed following its cession to the British in 1667. Similarly, Brooklyn derives from the Dutch name *Breukelen*.

86 Spinoza condemned the murder of the De Witt brothers as barbarism in his brief but forceful text *ultimi barbarorum*. This event marked the fall of a liberal regime: "The Prince of Orange finally finds the possibility of taking power in July 1672, obtaining military command of Holland. He restores a monarchy after several years of liberal aristocracy. A few months later, in August 1672, Jan de Witt and his brother are murdered at the hands of supporters of Orange. This fact greatly impresses Spinoza, who had staunchly defended the republican regime that had prevailed under De Witt" (Domínguez, 2022).

his doctorate in Angers. He practiced law in The Hague and by 1650 was representing Dordrecht in the States General. However, William II of Orange – Stadtholder and son-in-law of Charles I of England – wielded significant power and opposed the decentralized federalism advocated by the republicans.

In that year, 1650, conflict erupted between William II and various provincial powers who opposed his call for a military expansion. Several of his opponents were imprisoned – among them, Jan de Witt. The confrontation might have escalated further, but William II died suddenly on 6 November 1650, aged just 24. His only child was born posthumously and could not inherit the office of stadtholder. This created a power vacuum that allowed Jan de Witt to rise as Grand Pensionary in 1653, effectively governing the Netherlands until his death in 1672, opposing the conservative members of the House of Orange that always wanted to assume power again. In doing so, De Witt's leadership deepened the conflict between two political factions: the State Party, supported by the urban merchant class and republican municipalities, and the Orange Party, aligned with the nobility and advocates of hereditary monarchical authority. In one of his most consequential acts, De Witt abolished the office of stadtholder – traditionally hereditary and encompassing military command functions, as both captain and general admiral. This marked the height of republican dominance in the United Provinces.

However, the young William III of Orange, heir to the deposed lineage, gradually accumulated support as he came of age. Despite the economic prosperity and international prestige achieved under De Witt's leadership – marked by his promotion of free trade and diplomatic acumen[87] – resentment festered. The French and English invasion of the Dutch Republic in 1672 – the so-called "Rampjaar" or Year of Disaster – gave the Orange faction an opening to reclaim power. Amidst the crisis, an orchestrated campaign blamed the De Witt brothers for the nation's vulnerability. Cornelis de Witt was falsely accused of plotting to assassinate William III by the physician Jacob van der Graeff Tyckelaer[88] and was tortured in prison. When Jan

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87 See Israel (2023), *Spinoza, Life and Legacy*, particularly Part IV, "Darkening Horizons". Chapter 27, "Publishing the Theological-Political Treatise", places Spinoza's thought within the context of Jan de Witt's political vision.

88 Dumas (2014) relates the false testimony of Tyckelaer, a surgeon, who accused Cornelis de Witt of conspiring to assassinate William of Orange, declared that "Corneille de Witt, … inflamed with hatred against William of Orange, had commissioned an assassin to rid the

visited him in jail, both were attacked by an angry mob[89] incited by Orangist monarchist in favor of William III.[90] On 20 August 1672, they were dragged into the public square of Buytenhof in The Hague, where they were beaten, shot, stabbed, mutilated, and hanged naked – a public execution that symbolized the brutal end of the Dutch republican experiment.[91] The era without a stadtholder – from 1650 to 1672 – was over.

The political struggle between republicans and monarchists did not end with the De Witt brothers' deaths. William III reinstated the power of the stadtholder, but after his death in 1702, another republican phase began and lasted until 1748. Throughout the 18th century, the two ideological currents – Orangists and republicans (who began to call themselves 'patriots') – continued to alternate in influence. These patriots were increasingly inspired by the American War of Independence and the early stages of the French Revolution. This polarity echoed the ancient Greek tension between oligarchic and democratic factions, which had likewise contended for urban dominance.

From the French Revolution onward, the terminology shifted: republicans who sought to abolish monarchy sat on the 'left',[92] monarchists

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republic of the new stadtholder, and that this assassin was he, Tyckelaer, who, tormented by remorse at the mere thought of the action he was being asked to perform, had preferred to reveal the crime rather than commit it" (p. 14).

89 Alexandre Dumas (2014, pp. 11–51), in *The Black Tulip* (1850), narrates the horrific murder of the De Witt brothers in the opening chapters. Jan de Baen's painting *The Corpses of the Brothers De Witt* (1672–1675), currently displayed at the Rijksmuseum in Amsterdam, depicts the aftermath of the lynching in The Hague's Buytenhoff Square. The painting is viewable at www.rijksmuseum.nl.

90 Even oligarchic elites attempt to sway public sentiment. The Orangists roused popular fury against the De Witt brothers. As Dumas (2014) recounts: "The mob raised roars of enthusiastic love for Prince William, and cries of blind rage against the De Witt brothers" (p. 16).

91 Although Jan de Witt had tutored William III, he also stripped the House of Orange of its hereditary office. Many historians suspect William's involvement in the plot. However, Dumas – despite placing the young William at the scene – does not directly implicate him. After the event, Dumas places these words in William's mouth: "Those lords of Witt, poorly judged, poorly punished, in a moment of popular error, were two great citizens that Holland feels proud today" (Dumas, 2014, p. 265).

92 "As Gustavo Buno collects: 'It was in the session of August 28, 1789, … when (perhaps by analogy with the House of Commons, in which the party in power always sits on the right, leaving the left for the opposition) the supporters of the absolute veto were on the right and those that attached to a softened, or null veto, to the left'. This 'geography of the assembly' - as Mirabeau said on September 15, 1789 - remained. According to the French

who defended the king sat on the 'right'. These terms – gauche/droite in French, links/rechts in German, left/right in English – became entrenched in modern political discourse, albeit with wide variation in meaning. Following Norberto Bobbio's analysis, the left–right divide retains analytical value in contemporary politics, even amid critiques of its usefulness. The real task is to define, in each national context, the ideologies that aim to move history toward greater freedom, equality and social justice – as opposed to those that seek to preserve concentrated authority, defend oligarchic interests, and uphold religious orthodoxy.

The 17th and 18th centuries in Europe mark the foundational transition from absolutist to liberal models of government. This process may be said to begin with the beheading of Charles I of England in 1649 and reach a revolutionary climax in France with the execution of Louis XVI in 1793. Importantly, this political transformation was not merely theoretical; it involved experiments in governance – such as the Dutch Republic, which lasted about 20 years – that tested the viability of new constitutional models and the limits of political tolerance in an age of upheaval.

The new messiah of the Jews in the 17th century: Shabtai Tzvi

Before turning to Spinoza's *Theological-Political Treatise* (TTP), it is essential to understand the religious context of 17th-century Judaism – one marked by enduring messianic longing, especially among diasporic communities. This was a time when religious and political expectations remained deeply intertwined, and both popular imagination and rabbinical elites could be moved by charismatic figures who drew on biblical symbolism to embody collective hopes. It is within this atmosphere that Spinoza chose the title of his treatise – deliberately combining theology and politics.

One figure stood out above all others in that century: Shabtai Tzvi (also spelled Sabbatai Zevi). His story has been widely documented (Albiac, 2018, pp. 25–50; Becherand, 1667; Scholem, 1973; Sisman, 2015) as a striking

Senate records, the vote of those who were sitting on the left won that day, with 673 votes in front of the 325 on the right. The vote was the beginning of the end of the French monarchy and both Louis XVI and his wife Marie Antoinette would end up being guillotined four years later. The left and right term remained, and the assemblies continued to be placed by affinities. The differentiation did not take to long to enter into the political language and it remains so currently" (García, 2021, p. 15).

example of mass messianic enthusiasm. Here, the passion of many Jews is displayed with legends that have roots in Scriptures but that transcend to political sphere and that captivated beyond the national levels. Along with the intransigent Catholicism of the feudal era and the beginning of modern times, the Jewish religious authorities also practiced the harshness of intolerance towards dissidents, but they also allowed themselves to be carried away by legend, by the image and the call of the false Messiah.

Many passages of the Old Testament refer to the great return of the Messiah, who will lead the final liberation of the people of Israel. Although the twelve tribes of Israel had arrived in the so-called Promised Land around 1,200 BC and enjoyed great power and splendor under Kings Saul, David and Solomon, upon the death of the latter, the people of Israel were divided in two kingdoms: the Northern Kingdom, which was later destroyed by the Assyrians in 721 BC and of whose tribes nothing is known in history; and later the Southern Kingdom, also annihilated by the Babylonians in 586 BC when the Jerusalem temple was destroyed and many Israelites were taken into captivity. In the case of survivors of the southern kingdom, when the captivity ended by Cyrus decree, the Persian king who had defeated Babylonians, it was those of the Judah tribe who undertook the return in 538 BC to settle again in the promised land and began the temple reconstruction. But the Jews were never again the great kingdom that Israel had been in David and Solomon times, but they remained in that land of today's Palestine until the Roman general Titus – who later became emperor – massacred them in 70 AD destroyed the Jerusalem temple and dispersed them creating the event known as the *Diaspora* (*διασπορά* – Dispersion of the Jews around the world). Another great tragedy was the expulsion of the Jews from Spain in 1492 by the Catholic monarchs and later from Portugal by King Manuel I. in both cases, the Jews had to leave those countries or had the option to convert to Christianity.

In this story about the call to the promised land from the Babylonian captivity and the attempt to return to the homeland, they continued to believe that God had given that land to them, even after the almost definitive forced dispersion by the Romans; the feeling of hope always persisted, and a special case was the 17th century after more than 100 years of having been expelled from Spain and Portugal. Jacobs (1906) in the *Jewish Encyclopedia* takes a tour about birth and development of Jewish messianism when he speaks about the "rise and popular Belief in personal

Messiah" (Jacobs, 1906, p. 508). Especially, at the end of feudalism, a new longing was awakened for the redemption and arrival of a new savior:

> Maimonides sees the Messiah as a national, not a mystical, redeemer. And the Rabi Abraham bar Hiyya, a rationalist philosopher, tried to establish by astrological calculations the date of the coming of the Messiah. That whole world existed within the Jewish people in the face of messianic hope during the Middle Ages. Renaissance and Barroque both in Europe and in Muslim territories find a Jewish people continually harassed by persecution and slaughter, and then a series of measures emerge whose news spreads like wildfire through a desperate diaspora (Feldmann, 2003, p. 165).

By the 17th century – after more than a century in diaspora following the Iberian expulsions – this hope resurfaced with intensity. As Feldmann (2003, p. 165) notes, "Renaissance and Baroque Europe, as well as the Muslim world, found a Jewish people continually harassed by persecution and slaughter," and it is in this setting that messianic fervor found fertile ground. This was not new. From Maimonides to Rabbi Abraham bar Hiyya, Jewish thinkers had anticipated the Messiah – sometimes mystically, sometimes rationally, even through astrological calculations (Jacobs, 1906, p. 508).

Born in Smyrna in 1626, within the Ottoman Empire, Shabtai Tzvi was educated in the Talmud and deeply influenced by Kabbalah. He eventually came to believe he was the long-awaited Messiah. At age 21, he began proclaiming this identity, and though he was expelled from his community, he continued to spread his message across Greece, Egypt, and Palestine. In 1665 he met Nathan of Gaza, who declared Tzvi the true Messiah. This endorsement triggered a massive movement: Tzvi's fame spread rapidly throughout the Ottoman Empire and Europe, especially among communities devastated by centuries of exile, where he provoked great emotion due to the conviction of many that the Messiah had arrived and that the time to reach the promised land was approaching.

It is hard to understand how an individual phenomenon can become a mass movement. The coincidence between this man calling himself the Messiah and the longing of all Jews weighs heavily – those who had first been expelled by the Babylonians in 587 BC (and who had been able to return in 537 BC by decree of Cyrus, king of Persia), who had then been annihilated by the Romans in Jerusalem in 70 AD and whose survivors were

forced to disperse throughout the world in what they called the Diaspora, and who had also, many centuries later, been expelled from Spain in 1492 and then from Portugal. They continued to trust in what was expressed in the Torah about the coming of a liberating Messiah who would take them back to the land that God had promised them.[93]

> Assisted by his wife and his unconditional followers, Zevi's fame quickly spread and continued to grow throughout Germany, Holland, Greece and Italy, to name just a few countries, and the movement grew in believers every day. Even in one of the letters sent from Germany to the well-known philosopher Baruch Spinoza, there is talk of the existence of a Messiah, and of a new moment for the Kingdom of Israel, which would supposedly be reborn from the ashes and survive eternally (Angoso, R., 2023).

Also in Amsterdam, the city where Spinoza had lived until 1656, this messianic moment captivated many, dreaming on the advent of the Messiah incarnated in Shabtai Tzvi; many pilgrimages were organized towards Jerusalem, including not only Jews but also many Christians. Pollock confirms the breadth of the movement: "He gained a large number of followers not only in the Levant but in all synagogues of Europe" (Pollock, 1899, p. 28).

> The Jews of Amstel, with their spiritual pastors – one exception: Jacob Sasportas – at the head, feverishly prepared for the Great Return. And there was great agitation and great trembling in Amsterdam. Everyone gave themselves over to great celebrations, beating tambourines and dancing in the streets. All great names in the community immediately embraced, with authentic militant fervor, the cause of the messiahship of Sabbatai Zevi, proclaimed by the prophet Nathan of Gaza (Albiac, 2018, p. 20).

However, the climax came in 1666, a year loaded with apocalyptic symbolism. Tzvi travelled to Constantinople, capital of the Ottoman Empire, claiming that the Jews would soon regain their former splendor and even subjugate

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93 Certainly, the arrival of Jesus Christ during the Roman Empire under Octavian Augustus and Tiberius – who had also proclaimed himself the Messiah and Savior announced by Old Testament prophets – gave rise to a new current, that of the Christians. However, the Jews remained apart, not recognizing Jesus as the Messiah. After being expelled from Jerusalem by the Romans in 70 AD, they dispersed across the world but preserved their traditions, rites and the hope for a future liberator.

other nations. Sultan Mehmed IV – alarmed by the political implications – had him arrested. In Edirne, the Sultan gave Tzvi a choice: convert to Islam or be executed. Tzvi chose conversion. He took the name Aziz Mehmed Effendi, adopted Turkish dress, and was absorbed into the Ottoman bureaucracy. His wife and close followers also converted. Scholem recounts the outcome:

> The Sultan graciously accepted the convert, allowed him to take his own name, and promoted the then Sabbatai, and later Mehemet Effendi... to the honorary office of "guardian of the palace gates". A royal pension of 150 aspras daily was added to the office (Scholem, 1973, p. 658).

What must be considered is the effect of Tzvi's conversion to Islam on his followers – the multitudes who had believed in him as the new Messiah of the Jews. Many regarded it as a fiasco and a betrayal of the Jewish faith, yet others continued to believe in him. Tzvi still claimed to be a great prophet in contact with heavenly forces and insisted that his affiliation with Islam had been divinely ordained. His influence certainly declined across Europe, but he retained a considerable number of followers. "Thus ended an affair that Jews had regarded as the most important of their lives and which, however, had only a comical ending... The news immediately spread throughout Turkey, which thus learned how the alleged Messiah had paid homage to Muhammad..." (Albiac, 2018, p. 48).

Later, Tzvi – already a Mohammedan – was discovered practicing Judaism in secret (a form of Marranism). The Sultan responded by sending him into exile beyond Ottoman territory, to a region in Montenegro, where he spent his final years until his death in 1676. He continued to inspire followers who adopted the Turkish name *dönmeh* (meaning "apostate") – a group that persists to this day, with an estimated 15,000 members in Turkey and Greece. As Sisman (2015) explains, the *Dönmeh*, who became a sect after Tzvi's death, underwent a process of self-preservation, internalizing Kabbalistic philosophy and concealing their practices to protect themselves from broader social hostility.

This case exemplifies the entanglement of religion and politics in the 17th century. It shows how, even amid rigorous biblical scholarship and the enforcement of doctrinal orthodoxy, fanaticism could arise and sweep across entire communities. It also raises the question: why did most Jewish religious leaders in Amsterdam so eagerly embrace the messianic hope

proclaimed by Shabtai Tzvi, while showing such extreme intolerance toward Spinoza's theological writings?

Abraham Pereyra – born in Madrid, persecuted by the Inquisition, and later exiled to Venice before settling in Amsterdam – is illustrative in this regard. A successful merchant and philanthropist, he openly supported the Tzvi movement and published two books (Pereyra, 1666; 1671) expressing both his devotion to Judaism and his conviction that reason must be "clubbed" into obedience to the message of Scripture.[94] At a time when Spinoza was publicly challenging several core principles of Judaism, this approach found approval among the most hardline members of Amsterdam's rabbinical community: "The task of clubbing the intellect, which Abraham Pereyra imposes on himself, found… the enthusiastic support of the most intransigent among community rabbis" (Albiac, 2018, p. 122). For them, suppressing rationalist theology seemed more justifiable than resisting a messianic fraud. In the end, Tzvi's conversion made the deception undeniable, and many wished to consign it to oblivion – yet Spinoza's writings remained targets of censorship during his lifetime and continued to be suppressed even after his death.

Spinoza's excommunication by the Jewish community

The censorship of Uriel da Costa provides the historical backdrop in which Spinoza also lived – and in which he too would suffer public condemnation by Jewish authorities in 1656, alongside the Spaniards Juan de Prado and Daniel Ribera. Born in 1632, Spinoza lived through the rise of Judaism in Amsterdam, a period when different currents were being unified in a single synagogue and when Holland – newly independent from Spain – had established itself as, for several decades, "the freest, the most prosperous and the most tolerant in Europe" (Pollock, 1889, p. 3). Many believed that the New Jerusalem had at last been found. It is striking, then, that within one of Europe's first liberal and tolerant states, Jews could prove as intolerant as Catholics. However, the context is important: Amsterdam's

94 In both of these works – *The Certainty of the Path. Dedicated to the Lord God of Israel* (1666) and *Mirror of the Vanity of the World* (1671) – Pereyra ardently defends the Jewish faith and insists on containing any deviation from tradition. Nevertheless, he was captivated by the self-proclaimed Messiah and sought to visit him in Gaza.

Jewish community was receiving many arrivals from Spain and Portugal, many of whom had publicly professed Catholicism to avoid reprisals from ecclesiastical authorities, while secretly continuing to observe Jewish traditions – the so-called Marranos.

From the beginning, Spinoza stood out for his love of letters, disregarding the family business: "From childhood he attracted great hatred from his father, because, destined for commerce, he devoted himself totally to letters... When his father died, he left his country and all his inheritance (with the sole exception of a bed) to his relatives" (Domínguez A., in Colerus, 1705, pp. 91–92). He had been educated by Saul Levi Morteira, by Francis van den Ende, and later by another prominent Jewish teacher, Manasseh ben Israel. Through these teachers, he came to know in depth the Jewish teachings derived from Torah and Talmud. He also became well-versed in several languages – Spanish, Portuguese, Latin, French, Italian, and to some extent Hebrew, Greek, Dutch, and German. Van den Ende's radical thought introduced him to the writings of Giordano Bruno – from whom he drew his admiration for the universe – and to Descartes, whose rationalism dazzled him.

Spinoza had early debates with peers about the corporeality or incorporeality of God, the immortality of the soul, and the existence of angels. But it is not clear when members of the community began to question his views on Moses, the prophets, and the authority of the Jewish teachers of his time to the extent that they excommunicated him with the formal herem: "Neither the herem itself nor any other document of the time tells us exactly what his <evil opinions and actions> were supposed to be or what <abominable heresies> and <monstrous deeds> he is credited with having practiced or taught" (Nadler, 2022, p. 29).

However, from his later writings, I surmise that he had already begun to express the view that Scripture was not divine revelation, but human writing composed over time, that there was no rational proof for the immortality of the soul, and that God could not be found solely in temples or represented by religious hierarchies but was instead present throughout the universe. These views were already present in some circles in Europe, especially in England, with Hobbes and Milton. Hobbes, whose own *Leviathan* had been banned for atheism, is said to have remarked – after reading Spinoza's *Theological-Political Treatise* – that the book "had passed him by very far because he would never have dared to write so boldly" (quoted in Nadler, 2022, p. 59). Milton, for his part, defended freedom of expression in *Areopagitica*,

addressed to Parliament during Charles I's early conflict with the nobility, in which he argued for the freedom to publish and circulate ideas.[95]

What is certain is that in 1656, Jewish authorities sought to reprimand Spinoza forcefully, recalling the recent scandal involving Uriel da Costa and hoping to avoid another. Spinoza was accused of being a Cartesian – at a time when Calvinism condemned that doctrine. Morteira in particular attempted to dissuade him. He received a public reprimand, the first degree of ecclesiastical censure, and was excluded from the community for 30 days.

After this dispute became public, an unknown person attempted to stab Spinoza, but he managed to dodge the dagger. He then decided to leave Amsterdam and move to the outskirts, settling in Ouwerkerk, in a small Remonstrant community (followers of Jacobus Arminius), who had been condemned at the Synod of Dort.[96] It was there that he learned of the final decision of the Jewish congregation, pronounced on 27 July 1656. The text of the herem has a legendary tone, due to its harshness and ritualistic style. The original document, a form of religious and social ostracism, reads:

> With the angels' sentence and the saints' word, we exclude, expel, curse and execrate Baruch de Espinosa with agreement of our entire holy community, in presence of the holy books and the 613 commandments contained therein. We formulate this herem as Joseph formulated it against Jericho. We curse him as Elijah cursed the children and with all the curses that are written in the Law. Cursed be he by day, cursed be he by night, cursed be he during sleep and during wakefulness. Cursed be he when he comes in and when he goes out. May the Eternal never forgive him... (Albiac, 2018, p. 1).

Uriel da Costa's excommunication in 1640 had been far more severe, carried out publicly before the entire Jewish community, with flogging and the humiliation of being trampled by all present. In contrast, Spinoza was no longer in the community when the decision was announced. He was

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95 *Areopagitica* had the longer title: *Areopagitica: A speech of Mr. John Milton for the liberty of unlicensed printing to the Parliament of England*. Written in 1644, it is a fervent defense of freedom of expression, inspired by the orator Isocrates in 4th-century BC Athens.

96 The Synod of Dort (1618–19), held in the city of Dordrecht, was convened by Calvinists to condemn the doctrines of Arminianism, which, following Jacobus Arminius (d. 1609), argued that salvation depended not only on divine grace but also on human will and action – in contrast with Calvinist predestination. Arminius' followers, known as the Remonstrants, opposed this doctrine within Protestantism.

already living with a Remonstrant friend on the outskirts of Amsterdam. Thus, although the excommunication was formal and real, it was communicated in absentia. His financial support from his family's business was cut off. The image of the excommunicated philosopher was deliberately disseminated in public circles. One biography of Spinoza states:[97]

> The devil has reduced a great number of men, who seem to be acting on their own account and are dedicated only to destroying all that is most sacred in the world. It is doubtful, however, whether there is any among them who has worked for the ruin of the human race more effectively than this impostor, who has no other prospect than the ruin of State and Religion (Colerus, 1705, p. 426).

Spinoza, however, carried on with fortitude. He took up manual work as a lens grinder and adopted the Latin form of his name, Benedict. Unlike Uriel da Costa – whose despair drove him to suicide – Spinoza entered a prolific phase of philosophical writing. One of the key texts from this period is *Tractatus de Deo et Homine Ejusque Felicitate* (Treatise on God, Man, and His Happiness), published posthumously. The Jewish religious leaders also denounced him to the Calvinist civil authorities as a dangerous person. He left the outskirts of Amsterdam and in 1661 moved to Rijnsburg, near Leiden, among Remonstrants who were tolerated but had no churches or clergy. In 1664, he relocated to Voorburg, near The Hague, where he developed contacts with prominent intellectuals. Both his skill as a lens polisher – praised by the astronomer Christiaan Huygens – and his philosophical thought earned him respect. Leibniz corresponded with him and eventually visited him. As Pollock writes: "Leibnitz spent some time in Amsterdam, and visited Spinoza… There can be no doubt that in 1676 he was deeply attracted by all that he had learned from Spinoza" (Pollock, 1899, pp. 37–38). By 1670, Spinoza was based in The Hague, where he remained until his death on 21 February 1677 – most likely from silicosis caused by inhaling crystalline silica dust from lens grinding.[98]

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97 Albiac cites Albert Burgh's attack on Spinoza: "miserable homunculus, vile earthworm – better yet, food for worms," who seeks to elevate his "infatuated wisdom, through an unspeakable blasphemy, above the incarnate, infinite wisdom of the Eternal Father" (Albiac, 2018, p. 20).

98 See the article "La enfermedad que mató a Baruch Spinoza", published 20 April 2014 on Pale Blue Dot: https://www.esepuntoazulpalido.com/2014/04/la-enfermedad-que-mato-baruch-spinoza.html

In the period following his expulsion from the community, Spinoza continued to write. In 1661, living in Rijnsburg near Leiden, he worked on his texts *Principles of Cartesian Philosophy* and *Metaphysical Thoughts*, which were published in 1663. He then moved to Voorburg, near The Hague. Around that time, he began drafting *Ethics*, but set the project aside for several years to focus instead, in 1665, on the *Tractatus Theologico-Politicus* (TTP) and the treatise *De Intellectus Emendatione* (*On the Improvement of the Understanding*). In the latter, he argues that true happiness is achieved by cultivating the great virtues of the mind, though with a different emphasis than the one Descartes had placed on reason.[99] It is known that in the autumn of 1669, already living in The Hague, he submitted the *Tractatus* for printing; it began circulating anonymously in 1670.

A brief reference is necessary to one of his most important works, *Ethica Ordine Geometrico Demonstrata* (*Ethics Demonstrated in Geometrical Order*, 1674), which some (cf. Bennett, 1990) consider his masterpiece.[100] In it, Spinoza speaks of nature, the world, and God as one and the same substance – an idea that echoes Giordano Bruno's cosmic praise, for which Bruno was condemned to die at the stake in 1600. One of Spinoza's central claims in the *Ethics* is that there is no objective good or evil: these "are nothing other than ways of imagining, through which the imagination is affected in several ways and, nevertheless, the ignorant consider them as principal attributes of things" (Spinoza, quoted in Bennett, 1990, p. 14). Still, he seeks to show that *Deus sive Natura* leads humanity – through reason – to pursue the common good in society. This is a significant philosophical position. However, among his many writings, I focus here on the *Tractatus Theologico-Politicus* (TTP), as it is there that the rational aspiration for a democratic model of modern society re-emerges after centuries of oblivion.

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99 Spinoza's *Principles of Descartes' Philosophy*, later followed by *Metaphysical Thoughts*, acknowledges Descartes' major contributions, though the differences between them are not made explicit. Spinoza's main focus was on life's highest good, whereas Descartes sought truth alone.

100 Spinoza had begun writing *Ethics* a decade earlier but abandoned it to focus on the *Tractatus Theologico-Politicus* in 1665. He completed *Ethics* in 1674 and travelled to Amsterdam in 1675 to arrange its publication. However, hearing rumours that the work was interpreted as denying God's existence, he withdrew: "Having knowledge of these matters from trustworthy persons, who likewise told me that the theologians were laying plots against me on all sides, I determined to put off the publication" (Pollock, 1899, p. 37). He thus avoided further conflict with theologians. *Ethics* remained unpublished during his lifetime.

Though the first part is devoted to theology and the interpretation of Scripture, the treatise opens new and powerful horizons for political theory in the context of modern democracy.

After Spinoza's death, his close friends compiled his letters and unpublished works, which were published later that same year under the title *Opera Postuma*. These writings, too, faced severe bans and restrictions. As such, the only book Spinoza published under his name during his lifetime was the *Principles of Cartesian Philosophy* (1663), accompanied by *Metaphysical Thoughts* as an appendix. The *Theological-Political Treatise* (TTP) was also published anonymously in 1670, although its authorship was widely recognized. The treatise focuses on the concepts of democracy and freedom of expression, which will be examined in the following section.

The *Theological-Political Treatise* (TTP)

Begun five years earlier, the *Theological-Political Treatise* began to circulate in 1670 across Holland, France, Germany, and England, anonymously and under a long title: *Theological-Political Treatise, containing several dissertations, in which it is shown that freedom to philosophize can be granted not only with the preservation of piety and peace of the republic, but that it cannot be taken away except with the peace of the republic and piety itself.*[101] Although the author was not identified on the title page, it soon became known that the work had been written by the Jewish philosopher Baruch Spinoza. Having already been expelled from his religious community, Spinoza's writings came under scrutiny by the Calvinist Church, which eventually led to the text being banned in 1674.[102] "The Treatise was considered by Spinoza's contemporaries to be the most dangerous book

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101 *Tractatus theologico-politicus, continens dissertationes aliquot, quibus ostenditur libertatem philosophandi non tantum salva pietate et reipublicae pace posse concedi, sed eandem nisi cum pace reipublicae ipsaque pietate tolli non posse.* A 1989 English translation renders this: "A treatise partly theological and partly political, containing some few discourses to prove that philosophizing liberty (that is, making use of natural reason) may be allowed without any prejudice to piety, or to peace of any commonwealth; and that the loss of public peace and religion itself must necessarily follow, where such a liberty of reasoning is taken away" (Pollock, 1899, p. 30).

102 *Tractatus Theologico-Politicus* was soon denounced as a profane, blasphemous book. The consistories of Utrecht, Leiden and Haarlem ordered all copies to be seized, banning its publication and circulation (Nadler, 2022, p. 21).

ever published" (Nadler, 2022, p. 10). Nadler, in fact, recently published a history of this work under the title *A Book Forged in Hell*, citing the reactions of Dutch religious and civil authorities to illustrate the depth of hostility toward Spinoza's thought.

The purpose of the Treatise is clear. As Chantal Jaquet notes:

> The aim of the Treatise is to combat superstitious fear and contempt for reason in order to defend a freedom perceived by theological and political authorities as a ferment of sedition. To banish misology, Spinoza is going to prove that freedom does not threaten either religion or State by defining the relations between philosophy and theology on the one hand (chapters I–XV), between philosophy and politics on the other (chapters XVI–XX) (Jaquet, 2008, p. 58).

Spinoza's usual caution – signaled by the word *caute* he placed at the end of his letters – governed his decision to publish the work without his name. By this point, the ideological control of religious authorities over Jews in Amsterdam was well established, especially as many immigrants from Spain and Portugal had adopted public Catholicism while privately practicing Jewish traditions, often as Marranos. Earlier episodes – such as the public humiliation and tragic suicide of Uriel da Costa following his excommunication – exemplified the risks of public dissent. Even Spinoza's friend, the physician Lodewijk Meijer, had chosen anonymity for his text *Philosophia S. Scripturae Interpres*, which questioned the divinity of biblical texts.[103]

Particular attention should be given to the case of Adriaan Koerbagh (1633–1669), a Dutch physician and freethinker with ideas similar to Spinoza's. He had criticized institutional religion and traditional morality and authored several controversial works, including *A Light Shining in Dark Places, to Illuminate the Main Questions of Theology and Religion* (Koerbagh, 2011), in which he openly rejected the doctrine of creation, the Trinity, heaven and hell, miracles, and the divinity of Jesus. After being denounced by his printer, Koerbagh and his brother Pieter were arrested and convicted of blasphemy. Koerbagh was sentenced to ten years of forced labor in Amsterdam's Rasphuis prison, where he died in 1669. It was

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103 Meijer's book was likewise banned by Dutch authorities in 1674, alongside Spinoza's *TTP*. In another sphere, the University of Utrecht had already issued a 1642 decree prohibiting the teaching of any philosophy other than that of Aristotle.

during this period, and likely influenced by these events, that Spinoza chose to publish his own treatise anonymously. The fears of religious authorities are understandable in light of Spinoza's forthright critique of religion:[104]

> In despotic statecraft, the supreme and essential mystery is to hoodwink the subjects, and to mask the fear which keeps them down with the specious garb of religion, so that men may fight as bravely for slavery as for safety, and count it not shame but highest honor to risk their blood and their lives for the vainglory of a tyrant (Spinoza, 1670, p. 5).

Facing harsh criticism from both Calvinist and Jewish theologians and seeking to avoid further conflict with political and religious authorities, Spinoza advised against translating the treatise into Dutch – a position that was likely supported by Jan de Witt. However, tensions escalated with the French invasion and the murder of the De Witt brothers on 20 August 1672. Despite its prohibition in 1674, the *Treatise* continued to circulate widely, due to strong public interest. By that time, Spinoza had already completed his final major work, the *Ethics*, in 1675, although its publication faced multiple obstacles.

Spinoza died in The Hague on 21 February 1677 without having published the *Ethics*. Meanwhile, the *TTP* – despite being placed on the Catholic Church's *Index Librorum Prohibitorum* in 1679 – was soon translated into several languages: French (1678), English (1689), Dutch (1693), German (1787), Italian (1875), and Spanish (1878). Following his death, Spinoza's friends published the *Opera Posthuma* in Latin and Dutch in 1677. These, too, were banned by the government of William of Orange in 1678 and placed on the Index in 1690.

Spinoza's rationalism led him to question the content of Scripture, including the reality of miracles. Nothing, in his view, could contradict natural laws. He clearly distinguished between imaginative prophecy

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104 Atilano Domínguez refers to this in his introduction to the *TTP*: "Fear," he says, "makes men naturally superstitious and makes them attribute every extraordinary event to the gods. Hence kings have long favored this sentiment, creating an aura of divinity for themselves in order to better manage the masses. That is what Christians and especially ecclesiastics do in our days, he adds. Far from practicing charity, they let themselves be carried away by greed and ambition. As their only objective is to acquire prestige before ignorant people, they base their ideas on Scripture and persecute as heretics those who do not share them" (Domínguez, in Spinoza, 1670, pp. 11–12).

and mathematical certainty, between theology and faith on the one hand, and philosophy and reason on the other. His study of Judaism and Christianity, approached as historical phenomena, led him to conclude that the Bible – both Old and New Testaments – was a collection of human writings compiled over more than two thousand years. Rather than a divine revelation, Scripture was the product of creative imagination, aimed at inspiring religious sentiment and social order. This imagination, he argued, attributed human characteristics to God, turning the Old Testament into an instrument of religious authority enforcing obedience. Similar critiques extended to Catholicism. Though he recognized Jesus as a man of extraordinary wisdom, he denied the doctrine of divine incarnation and saw the Christian legacy as largely shaped by ecclesiastical power.

Such critiques led many contemporaries to label Spinoza an atheist – a charge he explicitly rejected. He identified himself as religious, but not in conventional terms. For Spinoza, divinity was not an omnipotent, anthropomorphic ruler who judged and punished, but a cosmic and immanent presence – *Deus sive Natura* – akin to the vision expressed by Giordano Bruno. In Amsterdam, however, religious tensions remained high. Jewish leaders, still reeling from the Shabtai Tzvi scandal and the legacy of the Synod of Dort and Uriel da Costa's condemnation, lodged complaints in 1671 with the States General of Holland. They demanded the prohibition of Hobbes's *Leviathan*, Meijer's *Philosophia Sacrae Scripturae Interpres*, and Spinoza's *Theological-Political Treatise* – a prohibition that was successfully enforced in 1674.

Spinoza's rational thought stands in clear contradiction to the dominant doctrines of both Jewish and Christian religions. There cannot be a single truth bound to the Bible, and therefore, freedom of thought becomes essential. This recalls the Greek concept of *parrhēsia* – the courage to speak truth to power – as brilliantly analyzed by Foucault (2019) in *Discourse and Truth and Parrēsia*. The possibility of expressing the truth in the presence of authority becomes a fundamental element of democratic life, alongside freedom of thought. In this context, the State should be conceived as the guarantor of peaceful order, grounded in a social pact of consensus among citizens. As such, not only religion but also the State must promote and protect freedom of expression to avoid descending into despotism.

Spinoza's *Treatise* presents a unified vision: it does not treat religion and politics as separate spheres but analyses their relation, anticipating both the

need for religious liberty and the notion of a secular State. On the one hand, no Church or religious institution can claim to represent God in society, for God is present throughout all of nature and cannot be enclosed within specific rites, practices, or places. On the other hand, absolute monarchies possess no divine character that would justify despotic rule over subjects, since political leaders must derive their legitimacy from a democratic and popular pact and must respect the plurality of thought among citizens.

As Atilano Domínguez notes in his translation and introduction to the *Theological-Political Treatise*, one of Spinoza's core theses is as follows:

> The times of monarchies clothed with a divine character and of theocratic society have passed, and the era of democracies, supported by the popular vote, and of secular society begins. With this treatise, Spinoza closes *ante litteram* the era of monarchical absolutism and religious reforms and opens times for democracy and social reforms. Locke and Rousseau, the great theorists of the new regime, have great debts with him, unconfessed, but indisputable (Domínguez, in Spinoza, 2015, p. 18).

Spinoza develops a wide range of theological critiques, particularly of Judaism. Most centrally: Who is God? Is God confined to synagogues and represented solely by religious authorities, or is the divine present throughout the universe? Are soul and body separate substances, or is there instead an indissoluble unity of matter and spirit? Are there physical realms after death – heaven, hell, purgatory – where the soul exists eternally in either reward or punishment? Why have the Hebrews considered themselves chosen by God, with a promised land unlike the rest of humanity? Why do prophets believe themselves divinely authorized to interpret history and foresee the future? Are the various claims about angels not inherently implausible? Should one accept the veracity of all miracles described in sacred texts?[105]

For Spinoza, the Torah does not contain sufficient proof for the immortality of the soul. He demonstrates that Scripture had multiple human authors, each embedded in specific cultural and historical contexts. These

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105 In a chapter dedicated to miracles and their interpretation, Spinoza writes: "a miracle is that whose cause cannot be explained by the principles of natural things known by natural light ... it is true that ancients considered a miracle what they could not explain in the way in which the common people usually explain natural things ... ; in the Holy Scriptures many things are narrated as miracles, whose causes can be easily explained by known principles of natural things" (Spinoza, 1670, p. 87).

writings reflect anthropomorphism – the projection of human characteristics onto God. Humans, he argues, imagine God as embodying love and hate, wisdom and anger, mysticism and corporeality, among others – traits modelled on human experience. All supposed divine revelation must instead be subjected to the "natural light" of human reason.

On prophets and prophecy, Spinoza is direct: "We need no longer scruple to affirm that the prophets only perceived God's revelation by the aid of imagination, that is, by words and figures either real or imaginary" (Spinoza, 1670, pp. 24–25). Furthermore,

> Inasmuch as imagination is fleeting and inconstant, we find that the power of prophecy did not remain with a prophet for long, nor manifest itself frequently, but was very rare; manifesting itself only in a few men, and in them not often (Spinoza, 1670, pp. 25–26).

Such theological positions prompted lasting rejection from Jews, Catholics, and Protestants alike.

The political dimension – inseparable from its religious implications – is particularly significant. Spinoza insists on maintaining a clear distinction between theology and philosophy, the latter grounded in reason: "Philosophy has no end in view save truth: faith, as we have abundantly proved, looks for nothing but obedience and piety" (Spinoza, 1670, p. 189). In so doing, he refutes the notion that philosophy must serve theology. Spinoza points out that even Maimonides – though often overlooked – had defended the idea that Scripture must be interpreted through reason.[106] He critiques how religion becomes superstition when used by monarchies to sustain power. In times of suffering, contradiction, and political oppression, belief in supernatural forces arises, often reinforced by rulers who present themselves as divine.

Freedom of interpretation is not limited to Scripture. Spinoza also defends freedom of expression as a civil right. The State must guarantee the right of every individual "to think what he likes, and say what he thinks" (Spinoza, 1670, p. 11). This is a foundational principle of democratic governance.

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106 This marks the decisive difference between feudal and modern thought. Even within Judaism, thinkers like Jehuda Alfakar insisted reason must submit entirely to Scripture – a view echoed by Thomas Aquinas. Spinoza, by contrast, regarded reason as a divine light which should never be subordinated to ancient texts.

Otherwise, the result is a system of total repression: "The most tyrannical governments are those which make crimes of opinions, for everyone has an inalienable right over his thoughts" (Spinoza, 1670, p. 241). Freedom, for Spinoza, consists in the ability to think and speak according to one's own understanding, without fear of punishment.

Nonetheless, political realism must also be acknowledged. As Spinoza writes: "The natural right of the individual man is thus determined, not by sound reason, but by desire and power" (Spinoza, 1670, p. 201). In other words, society is not always governed by reason but by competing interests and desires. This makes the need for a social pact evident – one that restrains passions and fosters collective order. Reason guides the individual to choose the greater good over the lesser, and the lesser evil over the greater.

The State must therefore be designed to repress the destructive impulses of individuals – greed, anger, pride, and ambition – in favor of a rational and stable collective order. This is the foundation of Spinoza's political proposal, as captured in the epigraph to this chapter: "a body politic of this kind I called a Democracy..." (Spinoza, 1670, p. 205).

While governments may at times err or issue unreasonable orders, Spinoza observes: "In a democracy, irrational commands are still less to be feared: for it is almost impossible that the majority of a people, especially if it be a large one, should agree in an irrational design" (Spinoza, 1670, p. 206). Individuals may surrender certain rights to a sovereign authority, but this does not imply slavery. Citizens obey laws established by reason and directed toward the common good. Under such conditions, submission does not equate to servitude. Among all systems of governance, Spinoza concludes, democracy is most firmly grounded in reason. His summary is unequivocal:

> I have now shown sufficiently clearly the basis of a democracy: I have especially desired to do so, for I believe it to be of all forms of government the most natural, and the most consonant with individual liberty. In it no one transfers his natural right so absolutely that he has no further voice in affairs, he only hands it over to the majority of a society, whereof he is a unit. Thus, all men remain, as they were in the state of nature, equals (Spinoza, 1670, p. 207).

Interestingly, criticism of Spinoza's work focused almost entirely on its religious implications, not its political theory. He was accused of atheism

and of disrespecting divine revelation.[107] This recalls the accusations faced by Giordano Bruno and, later, those directed at Galileo during Spinoza's childhood. In each case, the core issue was the challenge posed to religious institutions. For religious authorities – Catholic, Protestant, or Jewish – all thought had to be subordinated to their interpretation of divine will. Political and social philosophy remained secondary, always subject to the official theology.

In 1649, following an eight-year civil war, King Charles I of England was executed after defeat by the parliamentary forces led by Oliver Cromwell. Although his son, Charles II, would later return from exile in France to reimpose monarchical rule, the ideas expressed in Spinoza's *Theological-Political Treatise* (TTP) resonate with the evolving debates around governance and liberty during this period. While no direct influence can be definitively traced, it is plausible that some of the Treatise's democratic principles echoed in the later thought of John Locke – regarded as the father of liberalism – particularly in his emphasis on limiting governmental power through institutional counterweights, a concept that would ultimately crystallize in the English parliamentary model.

By the late seventeenth century, England had not yet opened an explicit debate on democracy. Rather, the political model that began to develop was rooted in a limited revival of republican ideas derived from ancient Rome, as seen in the Dutch Republic under Jan de Witt or, later, in the institutionalization of parliamentary rule. After the Glorious Revolution of 1688, the English monarchy ceased to function as an absolutist regime. Although the monarch remained as a formal head of state, real political authority was increasingly vested in a prime minister appointed by the parliamentary majority. This marked a significant transition: England had become the first European state to shift from absolutism to a liberal government. Yet the term 'democracy' remained absent from political discourse and would only be adopted more broadly in the Enlightenment.

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107 Spinoza consistently denied accusations of atheism. He considered himself religious, though his understanding of divinity differed fundamentally. While the Church and rabbinical authorities located God in sacred buildings and priestly intermediaries, Spinoza – following Bruno – affirmed that God exists throughout the universe and within us. In *Ethics* he states: "The supreme good of the soul is the knowledge of God, and its supreme virtue is that of knowing God ... The supreme good of those who follow virtue consists in knowing God – that is to say, a good that is common to all men, and that can be possessed equally by all." (Ethics IV, prop. XXVIII & XXXVI, quoted in Rodríguez, 1983, p. 168).

In its early form, however, the English parliamentary system remained deeply oligarchic. Political participation was confined to a narrow elite – landed nobles and wealthy men – who alone could vote, elect representatives, and shape policy. Universal suffrage was still more than a century away. The transformation toward a more inclusive political model would be catalyzed by the French Revolution of 1789, which introduced into public debate a wider array of concepts including democracy, liberalism, republicanism, and eventually, by the end of the eighteenth century, claims for the political rights of women.

The idea of political parties as instruments of collective organization also emerged gradually through the Enlightenment, reflecting a more complex understanding of political engagement than had existed in the seventeenth century. Thinkers such as Montesquieu, Voltaire, and Rousseau advanced theories of political sovereignty, civil liberty, and the social contract that would help lay the foundations for modern democratic theory. Nonetheless, it is to Spinoza that one must attribute the early and original formulation of a democratic model grounded in reason and public liberty. He was the first modern thinker to reintroduce democracy as a legitimate political form and to defend its theoretical coherence against absolutism.

By 1673, the *Treatise* and Spinoza's other works had circulated widely across Europe. That year, he was invited to occupy a chair in philosophy at Heidelberg, with assurances that he would be granted complete freedom of thought – so long as he did not "disturb the established religion". Spinoza declined, citing two reasons: first, that teaching would detract from his philosophical research; and second, that the vague stipulation regarding religion imposed a constraint he found rather incomprehensible.[108]

That same year, following the invasion of the Dutch Republic by French forces and the assassination of the De Witt brothers – with whom Spinoza had been especially close, particularly Jan, the Grand Pensionary –, he was offered a pension by the French army, then stationed in Utrecht under the command of the Prince of Condé. The only condition was that he dedicate a future work to King Louis XIV. Consistent with his rejection of favor and patronage – and his opposition to tyranny – Spinoza refused.

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108 Spinoza declined the invitation to teach, writing: "I must give up philosophical research if I am to find time for teaching a class. I reflect, moreover, that I cannot tell within what bounds I ought to confine that philosophical freedom you mention in order to escape any charge of attempting to disturb the established religion" (Pollock, 1899, p. 34).

Spinoza greatly admired the liberal style of government embodied by Jan de Witt: tolerant, secular, and supportive of intellectual freedom. He regarded it as a practical instantiation of a republican ideal, drawing on the Roman model between the fourth and first centuries BC and recovering the long-neglected idea of Greek democracy. Although he described the Dutch Republic under de Witt as a democracy, he also recognized it as a republican model – suggesting a conceptual proximity between the two. The term 'democracy' derives from Greek political thought, while 'republic' stems from Roman practice. Roman thinkers did not speak of democracy but rather of *res publica* – a system of governance modern scholars have come to describe as a form of representative democracy.

Prior to Spinoza, political theorists such as Machiavelli and Jean Bodin had already examined the Roman Republic. Machiavelli did so in his *Discourses on the First Decade of Titus Livy*, and Bodin in his *Six Books of the Republic* (1576). However, Spinoza was the first to apply these classical concepts to the modern Dutch context and to connect them explicitly with democratic principles. These intellectual genealogies, while related, reflect distinct theoretical traditions.[109]

Although Greek democracy has been a focal point of this analysis, the republican tradition also demands historical and conceptual attention. This is demonstrated by the extensive research compiled in the two-volume *Republicanism* edited by Martin van Gelderen and Quentin Skinner (2002, 2005), which explores diverse national contexts including Italy, Germany, Holland, Castile and Aragon, France, England, and Scotland. These volumes also address the emergence of feminist thought within republicanism (Gelderen & Skinner, 2002, Part II, p. 125) and the role of commerce in shaping republican ideals (Part III, p. 177). At its core, the Roman republic relied on representation: key social sectors – notably the senatorial elite – were charged with debate and decision-making in a system designed to ensure economic and political equilibrium. Electoral processes existed but were largely confined to tribal assemblies and did not shape the essential structure of governance, which remained aristocratic and ultimately subject to military control. In Greek city-states,

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109 Although the United States may not offer the best model of democracy, it is noteworthy that its two-party system – alternating power between Republicans and Democrats – remains in place. Both parties claim to speak for the people: they say, "we the people." Yet their political practices deviate greatly from the classical republican and democratic tradition.

by contrast, elections were far less central, and many public offices were filled by lot rather than vote.

The application of the concept of republic to the Dutch government of the 17th century can be seen in how the De Witt brothers responded to the interests and pressures of various political groups within a federalist model that led to a significant economic and commercial expansion.[110] Spinoza described this moment as a democratic state grounded in tolerance of thought and freedom of expression. While Greek democracy was defined by many features beyond elections – which were often bypassed through drawing lots – what stands out here is the long-forgotten notion of δῆμος (*demos*), which began to re-emerge in the 17th century. It was Spinoza who reintroduced the concept into political discourse. Later, with the rise of liberalism in England, John Locke supported the first parliamentary model after the 1688 Glorious Revolution. However, this model replaced monarchy not with a broad-based democratic system, but with a representative structure dominated by the wealthiest sectors of society, which began to govern by promoting the freedom of producers and merchants under free market principles.

In the *Theological-Political Treatise* (TTP), one of the essential elements in defining democracy is freedom of expression for all citizens – a freedom that implies both the serious task of forming one's own ideas and the courage to speak truth before authorities and the public. However, as with the ancient Greek practice of *parrhesia*, such acts can be risky, particularly when the expressed opinion challenges an authoritarian ruler or the passions of the crowd. While the *parrhesiastes* – the one who speaks frankly – deserves admiration, Spinoza, like the Greeks, recognized the need for *phronesis* – the prudence to discern when and where truth can be spoken safely. This is even more relevant considering Spinoza's horror at the brutal murder of the De Witt brothers in The Hague on August 20, 1672. A close friend of Jan de Witt and a supporter of the republican model in Holland, Spinoza was so

110 Holland set the early precedent for republicanism by dethroning Philip II in 1585 and forming a federated republic. England followed, with the Civil War leading to Charles I's execution in 1649 and, later, the establishment of parliamentary government in 1688. As Gelderen and Skinner observe: "It was in the Netherlands, and later in England, that the repudiation of monarchy assumed its most dramatic forms. The Dutch abjured their allegiance to their overlord, Philip II, in 1581 and went on to fight successfully for the establishment of a federated republic, while the English executed their lawfully anointed king, Charles I, in 1649 and set up a Commonwealth and Free State" (Gelderen & Skinner, 2002, p. 2).

moved by the atrocity that he intended to circulate a pamphlet titled *Ultimi Barbarorum* (The Last of Barbarians). His friends, however, strongly advised against it – knowing the danger he would face if the text were traced back to him. Whether from the crowd, the French, or the newly empowered Stadtholder William of Orange, retaliation seemed likely. Spinoza was persuaded to refrain and, in the following years, turned his attention to completing *Ethics* and writing the *Political Treatise* (*Tractatus Politicus*).

This episode reveals how passions and emotions can impel individuals to act, even in societies that permit freedom of expression. Hence, *phronesis* remains indispensable – guided by reason, it helps determine the right moment for *parrhesia*. As Valenzuela explains, "Prudence, as presented by Aristotle, is the synthesis of all virtues, uniting good judgment, a sense of measure, and the right timing for action" (Valenzuela, 2014, p. 23). Human beings are indeed often moved by passionate impulses, but these must be tempered by rational deliberation – though such reasoned action does not always prevail.

Notably, Spinoza would end his letters with the Latin word *Caute* – be cautious or be prudent. This was precisely what he lacked in the heat of his indignation over the De Witt brothers' murder, when he nearly published *Ultimi Barbarorum*. Chantal Jaquet (2008), in her book *Spinoza or Prudence*, analyses this very concept within the context of 17th-century Holland. Despite the formal tolerance of religious practice and the republican spirit under Jan de Witt, Spinoza had experienced excommunication from the Jewish community, survived an assassination attempt, been forced to leave Amsterdam, and witnessed the savage murder of his friend.

The caution urged in Holland was not abstract; it was embodied in the Utrecht Decree. Beyond practical wisdom – knowing when and where to speak political truths – there is also theoretical prudence: the ability to critique received ideas, including religious or societal dogmas, without claiming absolute certainty in one's own knowledge. Thus, while Spinoza's use of *Caute* expressed a practical warning about freedom of speech in real contexts, Jaquet writes that:

> Far from being a form of fear and a way of retreating with distrust, it embodies a form of rational audacity, because it involves resuming anew and with total freedom the examination of an object, ignoring prejudices and yielding to the sole necessity of its nature (Jaquet, 2008, p. 22).

Such principles must be taken seriously in modern democratic societies.

Freedom of expression in a democratic state

In contemporary democracies, debates around freedom of expression persist – especially in regions such as Latin America, where authoritarian regimes or dictatorships have often imprisoned, repressed, or even killed dissenters merely for expressing their views in public. It is therefore worth revisiting Spinoza's reflections on freedom of thought and speech as essential elements of democratic life.

A century later, in the age of the Enlightenment, Voltaire would continue to advocate for religious freedom. In particular, he wrote *Traité sur la tolérance*, published in 1763, to recount and defend the case of a Protestant family in Toulouse, France. In this case, Catholic townspeople had falsely accused the father of murdering his own son for allegedly converting to Catholicism.[111] The religious fanaticism of Roman Church adherents led to the public execution of the father, Jean Calas.

But one may ask whether intolerance toward divergent ideas or religious beliefs has truly disappeared from contemporary democratic systems. Recent examples suggest otherwise. In Iran, Mahsa Amini, a 22-year-old woman, was arrested in Tehran by the "Morality Police" on 16 September 2022 for allegedly wearing her headscarf improperly. She was beaten in custody and died shortly thereafter in hospital. In Mexico – a secular state – a similarly tragic case occurred: Giovanni López Ramírez, a young man from Ixtlahuacán de los Membrillos, Jalisco, was arrested by municipal police on 4 May 2020 for not wearing a face mask during the COVID-19 pandemic. The following day, his body was returned to his family, with authorities admitting the officers had "gone too far" (BBC News, 2020). If such extreme outcomes result from minor infractions like the improper use of a veil or a face mask, what are the risks faced by those who dare to criticize the ideological foundations of authoritarian regimes?

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111 Voltaire recounts the Calas affair of 1762: how the son of Marc-Antoine Calas family was found dead in his own home in 1762, at 10 o'clock at night; how the people fanaticism immediately believed that the family itself had strangled him out of hatred of Catholic religion; how Jean Calas, the family head, was specifically accused of having committed murder and how he was then executed in the public square; how the mother and one of the brothers were also imprisoned; how the family was stripped of all property and condemned to exile. After a lengthy investigation – with Voltaire's intervention – the family was exonerated, but mass fanaticism had already claimed its toll: "*Pendant que le père & la mère étaient dans les sanglots & dans les larmes, le Peuple de Toulouse s'attroupait autour de la maison … quelque fanatique de la populace s'écria que Jean Calas avait pendu son propre fils Marc-Antoine … Les esprits une fois émus ne s'arrêtent point*" (Voltaire, 1763, pp. 4–5).

These examples speak to the broader issue of institutional intolerance – especially by police and security forces – and the repression of free speech across the globe. It is vital to recognize the dangers faced by whistleblowers, many of whom have paid with their lives for denouncing abuses of power. According to the United Nations, "86 journalists and media workers were killed worldwide in 2022 – one every four days" (United Nations, 2023), with Latin America ranking as the deadliest region for the press.

In light of this, it becomes crucial to revisit the historical cases of individuals who were excommunicated or ostracized for their ideas, including those persecuted in 17th-century Holland. Freedom of expression – both religious and political – must be seen as a core principle in any republican or democratic system. This is not merely a historical matter; the reference is not only to the policies of the Inquisition or Orwell's "Ministry of Truth", but to the ideal functioning of a society in which citizens are genuinely free to think, speak, and dissent.

Ian Buruma, a contemporary Dutch author and scholar of Spinoza, stresses the enduring relevance of these struggles to our present. He writes:

> When someone disagrees with certain dogmatic beliefs, they are treated as heretics: they are no longer burned at the stake, but they can suffer serious social and professional damage. One knows that we live in a new era of religious intolerance, where what matters is not reasoned debate but the purity of faith. That is why I was interested in writing about Spinoza. The intolerance forces in his time were the Sephardic rabbis who expelled him from the Jewish community, and the Calvinist Church, which had a powerful influence in the Dutch Republic. Some of his anticlericalism may seem old-fashioned now, but his defense of free thought, scientific research, and freedom of expression is as important now as it was in the 17th century (Buruma, 2022, pp. 13–14).

The final part of the *Theological-Political Treatise* is devoted to this very theme – the relationship between democracy and freedom. Spinoza argues that the core aim of his work is to defend the right of citizens to reason, to judge, and to express their views openly. As Nadler (2022, p. 11) explains: "The political chapters of this book offered the most eloquent defense ever written of tolerance (especially of the freedom to philosophize, without interference of authorities) and of democracy". By contrast, Spinoza warns against the dangers of authoritarian repression: "a government would be

most harsh which deprived the individual of his freedom of saying and teaching what he thought" (Spinoza, 1670, p. 258).

This is the logic of monarchy – where a single ruler claims exclusive access to truth. But repression of thought is never effective:

> Let it be granted that freedom may be crushed, and men be so bound down, that they do not dare to utter a whisper, save at the bidding of their rulers; nevertheless, this can never be carried to the pitch of making them think according to authority... The more rulers strive to curtail freedom of speech, the more obstinately are they resisted (Spinoza, 1670, pp. 261–262).

Still, some might ask whether total freedom of expression is always compatible with political stability. If individuals use their freedom to attack the state or threaten the common good, should restrictions apply? Spinoza addresses this concern directly: "It is therefore incumbent upon us to investigate to what extent this freedom can and should be granted to each person, without attacking the State peace and the supreme powers rights" (Spinoza, 1670, p. 205). Freedom of thought must never be suppressed. Freedom of speech, too, should be guaranteed. However, when speech incites sedition or aims to destabilize public peace, it must be subject to limits. Ideological and political dissent must be accepted – for unanimity is neither achievable nor desirable – but any action that undermines the common good should be firmly opposed. The city of Amsterdam under Jan de Witt exemplified this balance, a society where freedom of belief and expression coexisted with remarkable religious tolerance and civil peace for a long time:

> In a democracy (the most natural) form of government, ... everyone submits to the control of authority over his actions, but not over his judgement and reason; that is, seeing that all cannot think alike, the voice of the majority has the force of law, subject to repeal if circumstances bring about a change of opinion... The city of Amsterdam reaps the fruit of this freedom in its own great prosperity and in the admiration of all other people. For in this most flourishing state, and most splendid city, men of every nation and religion live together in the greatest harmony, and ask no questions before trusting their goods to a fellow-citizen, save whether he be rich or poor, and whether he generally acts honestly, or the reverse. His religion and sect is considered of no importance: for it has no effect before the judges in gaining or losing a cause (Spinoza, 1670, p. 263–264).

The issue of freedom of expression remains complex, as it always requires reflection on how far a citizen's speech can go and the manner in which it is exercised. Spinoza supports the idea that such freedom must exist in a democracy, though he acknowledges a limit: it must not incite actions against the State, which he conceives as the representative of the common good. One cannot renounce the freedom to reason and to judge, but one must certainly renounce the right to act against the collective interest. As he himself admits: "I confess that from such freedom inconveniences may sometimes arise, ... But it must be maintained because 'such freedom is absolutely necessary for progress in science and the liberal arts: for no man follows such pursuits to advantage unless his judgement be entirely free and unhampered'" (Spinoza, 1670, p. 261).

Spinoza's emphasis on reason in public affairs is foundational, but he also recognizes that not all individuals are guided by reason. Many adopt positions and carry out actions driven by personal interest and opposed to the community. To control these irrational actions, a State – a supreme power – becomes necessary. The freedom of opinion must always be preserved, but, at the same time, it must be considered that: "the rights of rulers is sacred, no less than in secular matters, should merely have to do with actions, but that every man should think what he likes and say what he thinks" (Spinoza, 1670, p. 265). This is precisely the public policy that effectively promotes peace, since, rationally, the State must pursue the common good:

> If governments are to retain a firm hold of authority and not be compelled to yield to agitators, it is imperative that freedom of judgment should be granted, so that men may live together in harmony however diverse, of even openly contradictory their opinions may be (Spinoza, 1670, p. 263).

Does this mean Spinoza approaches the position of Hobbes's *Leviathan*? In truth, he acknowledges the need for a supreme power – but not an absolute one. This central authority is not singular, as in a monarchy or the *Leviathan*, since it is exercised through citizens' assemblies. Freedom of speech must also exist within these assemblies. And because these are composed of individuals with multiple perspectives and interests, it is almost impossible to reach unanimity. How, then, can a resolution be adopted in a democracy?

Here Spinoza proposes a rule that may be applicable to contemporary societies: "in a conference of great and small powers, schemes are

seldom carried unanimously, yet all unite in carrying out what is decided on, whether they voted for or against" (Spinoza, 1670, p. 260). The rule is clear: freedom of expression must be preserved, but decisions made by the majority must be followed. However, this rule is rarely respected in contemporary democracies where opposition groups often refuse to accept majority resolutions, perpetuating conflict. This reflects the political reality: those who lose once often continue fighting or conspiring to win the next time. When this occurs in a peaceful environment of expression and negotiation, democracy can still function as a framework that avoids civil war. But when it results in destabilizing actions, the State must assert itself through institutional mechanisms of justice and, if necessary, repression.

In authoritarian or dictatorial regimes, repression of dissent – when co-option is not possible – has always been preferred over dialogue. The desire to control ideas has persisted throughout history. For example, in the 1st century AD, Emperor Vespasian issued an edict banning dissenting ideas: "by virtue of which those cynics who openly attacked the regime were crucified or executed, and all professional philosophers were banished from Rome," as Gaspar Morocho explains in his introduction to *Dion Chrysostom's Discourses* (Dion, 1988, p. 23). The aim was to exclude critical thinkers and repress subversive ideas.

Among those targeted were the Cynics – a school of radical thinkers from ancient Greece known for their disruptive public performances – as well as philosophers who, even if more moderate, expressed critical views.[112] Nero made no distinction between the two, ordering the death of Seneca, his former tutor, whose works reflected a Stoic philosophy of ethical self-improvement.[113] Vespasian treated Cynics with violence and

112 It was a philosophical school originally founded by Antisthenes of Athens, wanting to express the discontent of the lower classes of inhabitants of a city ruined by the effects of the Peloponnesian War; they were critical of the authorities and government institutions wanting to promote a return to a natural state of things. Antisthenes taught at the Cynosargus, the dog museum, and for this reason they began to call them κυνικός (dog), which also symbolized them as characters who only bark to protest situations of social injustice. By the 4th century BC, its greatest representative was Diogenes of Sinope (404–323 BC), who expressed his greatest happiness and virtue in renouncing wealth and disdaining all social conventions; without having any writings, his life is known through the work of Diogenes Laertius (1972) entitled *Lives of Eminent Philosophers*.

113 The philosopher Seneca (4–65 AD) lived immersed in the brutal political life of the Roman emperors of the 1st century AD, Caligula, Claudius and Nero. He was called by Agrippina to educate her son Nero, but the latter, already emperor, exercised power with great vio-

exiled other philosophers, clearly seeking to suppress dissident thought. And this is not limited to antiquity; in the 20th century, Antonio Gramsci was imprisoned in 1926 and sentenced to twenty years. While his affiliation with the Italian left was cited, the trial's most notorious statement came from the prosecutor: "we must prevent this brain from functioning for twenty years" – and Gramsci was confined in Turi, near Bari (Sen, 2016, pp. 262–263). In reference to such cases, Spinoza's harsh criticism of totalitarian regimes is fully applicable: "the most violent reign occurs where opinions that are the right of each person, which no one can renounce, are considered a crime" (Spinoza, 1670, p. 193).

Nonetheless, the distinction between different currents of thought – that of philosophers and that of Cynics – remains significant, particularly because the way criticism is expressed through freedom of speech is essential in the dynamics of power. Yet, the line separating them can be very thin.

Diogenes, perhaps the best-known figure among the Cynics, is famously depicted by Raphael in *The School of Athens*, lying barefoot and scantily clad on the steps below Plato and Aristotle, resembling a beggar. His criticism of the powerful was merciless, often expressed through scandalous actions such as urinating or masturbating in public. Such acts contributed to the widespread disdain of Cynics among elites, even if their search for virtue and happiness remained valid. They are part of the history of philosophy, but their radical mode of protest and grotesque liberty of expression distinguished them from thinkers who voiced criticism in more moderate terms. Both groups practiced *parrhesia* – frankness in speech – yet the former did so in a more dramatic and disruptive manner, while the latter pursued a reasoned and measured form of dissent. Though both spoke truth to power, the Cynics' manner was more shocking, while philosophers' approach was more discreet.

> The Cynic philosophers were hostile to any teaching that implied social life; they abandoned family to become citizens of the world, preferring a life of vagabonds and mendicants. For them, wealth was 'smoke', it did not constitute happiness,

lence, murdering his own mother. Seneca never represented a political danger for Nero, but finally in the year 65 AD he ordered his execution because he considered him subversive; the philosopher preferred his own death by poisoning and opening his veins in a hot bath. His writings on anger, the tranquility of the soul, providence, the constancy of the wise, the brevity of life... reflect his stoic thinking on living a good life in the midst of the turbulence of the world.

but an object of concern. Only the wise man could be self-sufficient and escape the power of fate (Ferrante, in Dion de Prusa, 1988, p. 256).

Can a clear distinction be drawn between Cynics and other philosophers? While both practiced philosophies, the edict of Emperor Vespasian in the 1st century AD makes the difference apparent: he ordered the execution of Cynics while merely banishing other philosophers. Around the same time, Dio Chrysostom – himself a philosopher – wrote a now-lost treatise titled *Against the Philosophers*, apparently criticizing both currents. However, his main target seems to have been the Cynics' grotesque and theatrical modes of protest. Although he, too, was exiled under Domitian, he later returned to Rome and to Prusa under the favor of Emperors Nerva and Trajan.

The boundary between these forms of *parrhesia* may be subtle, but the mode of expression matters. Radical and scandalous speech draws more attention and is more likely to be punished by those in power. Still, both styles – radical or moderate – require courage and can be classified as genuine *parrhesia*. Michel Foucault (2009) admired the Cynic tradition for this very reason: their courage to speak truth even in perilous circumstances. He extended this admiration to Christian martyrs who clung to their beliefs despite torture and death, and to later religious reformers who challenged the established Church in the Middle Ages.[114] He also recognized modern revolutionaries who boldly defied the status quo.[115] Likewise, literature and the arts have provided fertile ground for dissenting voices and alternative worldviews.

This radical lineage of truth-telling was violently suppressed during the Inquisition, a dark period stretching from the Middle Ages into the

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114 "There has been a Christian cynicism, an anti-institutional cynicism, a cynicism that I would say is anti-ecclesiastical, whose forms and features were still alive before Reformation, during Reformation, within the Protestant Reformation, or the counter-Catholic reform" (*Il y a eu tout un cynisme chrétien, un cynisme anti-institutionnel, un cynisme que je dirais anti-ecclésiastique, dont les formes et les traces encore vivantes étaient sensibles à la veille de la Réforme, pendant la Réforme, à l'intérieur même de la Réforme protestante, ou même de la contre-Réforme catholique*) (Foucault, 2008, p. 54).

115 "Cynicism, the idea of a way of life that would be irruptive, violent, scandalous manifestation of the truth made as part and conceived as part of revolutionary practice and of the forms practiced by revolutionary movements throughout the 19th century" (*Le cynisme, l'idée d'un mode de vie qui serait la manifestation irruptive, violente, scandaleuse de la vérité fait partie et a fait partie de la pratique révolutionnaire et des formes prises par les mouvements révolutionnaires au long du XIXe siècle*) (Foucault, 2008, p. 55).

early modern era. The Dominican-led persecution sought to eliminate any ideas contrary to Church dogma through coercion, torture, and execution. During this time, differences of philosophical nuance ceased to matter – all dissident thinking was criminalized. Jews, emerging Protestant communities in the 16th century, philosophers like Giordano Bruno, and countless alleged witches were burned at the stake. The cases of Uriel da Costa and Baruch Spinoza within the 17th-century Jewish community in Holland exemplify how this tradition of repression persisted even in the age of rationalism. In these instances, the persecution came not from civil authorities but from religious leaders within their own communities. In Spinoza's case, this led to his total excommunication: "the theologians, with their prejudices, prevent men from devoting themselves to philosophy; the masses accuse him of being an atheist; and the preachers, with their excessive authority and petulance, suppress freedom of expression" (Domínguez, in Spinoza, 2015, p. 9).

Though Spinoza did not explicitly belong to the Cynic tradition, his assertions were radical. For example, in discussing the Bible, he denied that its authors were divinely inspired and attributed their writings to the imagination of men (Spinoza, 1670, pp. 13–26). Whether expressed bluntly or more analytically, this claim shook the very foundations of theology. Similarly, when addressing miracles in Scripture, he explained that "as men are accustomed to call Divine the knowledge which transcends human understanding, so also do they style Divine, or the work of God, anything of which the cause is not generally known" (Spinoza, 1670, p. 81). Spinoza's defense of religious and intellectual freedom, and his proposal of a democratic model grounded in free thought, is among his most compelling contributions. He advocated for a regime in which "everyone is allowed to think what he wants and say what he thinks" (Spinoza, 1670, p. 38). This freedom, he believed, must exist independently of majority rule. Thought is not subject to the vote. Nearly two centuries later, the liberal thinker John Stuart Mill would reiterate the same principle, affirming the importance of individual rights and the need for the millions of silenced women to speak freely and claim their civil rights:

> If all mankind, except one person, were of one opinion, and this person were of the opposite opinion, mankind would be as unjust in preventing him from speaking, as mankind itself would be unjust in preventing him from speaking, if it had sufficient power to prevent mankind from speaking (Stuart Mill, J., 1994, p. 7).

This section may be concluded with several observations on Spinoza's *Political Treatise* (PT) (1986), a work in which the philosopher could have further developed his views on models of government. The text – included in the *Opera Posthuma* (Spinoza, 1677), published shortly after his death – remains incomplete, consisting of only eleven brief chapters.[116] Spinoza offers considerable analysis of monarchy and aristocracy, but when he reaches Chapter XI – where he begins to address democracy – the discussion extends to merely four pages. He had already approached the topic in the *Tractatus Theologico-Politicus* (TTP), but the *Political Treatise* does not provide a more systematic or detailed treatment. Before he could reflect further on the actual functioning of democracy, the project was left unresolved – revealing, once again, the same limitation already observed in classical Greece: democracy is conceived only in reference to citizens, understood as a narrowly defined social group. Foreigners – referred to by Spinoza as *pilgrims* – are excluded, as they remain subject to the laws of another sovereign; serfs – likened to slaves, subject to their masters' law – are likewise excluded; women are considered to be under male authority; and those with a criminal background or a "dishonorable way of life" are similarly denied civic standing (Spinoza, 1686, p. 222).

With regard to women, Spinoza reproduces the dominant intellectual assumptions of the seventeenth century – assumptions inherited from earlier traditions, particularly Aristotelian. He asserts that "women do not have, by nature, an equal right to that of men but, by necessity, are inferior to them" (Spinoza, 1986, p. 223). It is crucial to emphasise how deeply this conception of gender inequality – grounded in natural law – became entrenched across centuries. Even though Spinoza contributed to the seventeenth-century rethinking of democracy, he did not acknowledge what Broyelle (1974) and Kristof and Wudunn (2011) have later called *Half of the Sky*.[117] On this issue, he remained within the cultural and

116 When Spinoza died on 21 February 1677 in The Hague, his friends devoted themselves to gathering his texts (including many letters) and published them nine months later in the *Opera Posthuma*. This collection included *Ethica, Tractatus Politicus, Tractatus de Intellectus Emendatione, Epistolae* (correspondence), and the *Compendium grammatices linguae hebraeae*.

117 Claudie Broyelle (1974) refers specifically to the women's liberation movement in China, while Kristof and WuDunn (2011) gather testimonies of 20th-century women who became agents of change and development, particularly in China. The idea that "women hold up half the sky" originated with Confucius and was later used by Mao Zedong to stress the role of women in building the new socialist society.

philosophical legacy shaped by Aristotle and Thomas Aquinas. The enduring tradition of justifying women's subordination through appeals to natural law is one of the most significant unresolved contradictions facing contemporary democratic theory – as Giulia Sissa (2021) convincingly argues in her study *Un défi pour la démocratie*, where she frames women's political exclusion as an ongoing democratic challenge.

Sissa's analysis is particularly incisive in identifying classical Greek democracy as patriarchal, chauvinistic and exclusionary – not only of women, but also of slaves and metics – and in calling for a break from this legacy in modern democratic governance. She provides a detailed historical critique, placing particular emphasis on Aristotle's doctrine of female inferiority and the even more doctrinaire formulations of Thomas Aquinas. Both thinkers exerted enormous influence on natural law theory, which continued to shape philosophical and legal thought into the modern era. Even the liberalism of Locke – and, more explicitly, Rousseau in *Émile* – maintained that male superiority was a natural fact and that women ought to be educated solely for domesticity and obedience. This systematic exclusion of women casts a long and enduring shadow over the legacy of both ancient democracy and many modern democratic regimes.

The history of political thought shows that it was only in the late eighteenth century – with figures such as Condorcet and Mary Wollstonecraft – that the public debate on women's citizenship and political participation began in earnest.[118] In the case of Mexico, for instance, the right to vote was not extended to women until 1954. Yet the ideological contest over the meaning of natural law continues into the twenty-first century. María García Castro[119] has asked why the views of Aristotle and Aquinas still prevail across large segments of society, often taking precedence over Condorcet's egalitarian proposals. The

118 The demand for equal rights between men and women was not taken up by the Universal Declaration of the Rights of Man during the French Revolution. It proclaimed the equality of all men, but not of women in relation to men. I have already devoted a specific text to this foundational demand that launched the public discussion on gender equality, highlighting the figures of Olympe de Gouges, Condorcet, and Mary Wollstonecraft; see the book *Politics, Democracy and Citizen Education* (Medina, 2015, pp. 138–157) at https://ignaciomedina.info.

119 Giulia Sissa (2021) presented her book *Le Pouvoir des Femmes. Un défi pour la Démocratie* at UAM Azcapotzalco (CDMX) on 30 May 2023; Dra. María García Castro participated as a commentator. The presentation can be viewed on UAM Videos, Social Communication: https://www.youtube.com/watch?v=08th_FTWK4U.

full recognition of women's rights thus remains an open and pressing challenge for democratic theory and practice.

Despite the clear limitations in Spinoza's conception of citizenship, there are compelling reasons to regard him as the first modern thinker to revive – after centuries of eclipse – the political legacy of Greek citizen participation and the Roman republican model. Both had largely disappeared under the Roman Empire and throughout the feudal period. Spinoza himself affirmed, in 1674 after the assassination of the De Witt brothers: "I am a sincere republican and my aim is the greater good of the republic" (quoted in Spinoza, 1986, p. 14). It was only with this revival of rationalism that scientific analysis – grounded in empirical observation – and the foundations of democratic political theory, centered on the governed rather than the rulers, could begin to flourish once again.

Chapter III.

Truth, Post-truth and 'Paparrucha'

"No man has ever seen a clear truth
nor will he ever know it" (Xenophanes)
"In truth, we know nothing, for the
truth is found in a well" (Democritus).
Diogenes Laertius (1972) [120]

Stressing the conviction and courage needed to speak truth in a public forum – as was done in Athenian democracy with the concept of *parrhesia* – Michel Foucault (2009) developed a broad exposition in his course at the Collège de France from 1 February to 28 March 1984, a few months before his death in June that same year. From those lectures, the posthumous book *Le courage de la vérité* (Foucault, 2009) was later published, exploring multiple angles and specificities of these concepts. There, the author linked Greek thought with contemporary situations, placing particular emphasis on the ethical dimension of daring to speak frankly, citing Socrates as one of the key examples.

Foucault had already expressed admiration for the cynic attitudes of certain philosophers as a positive manifestation of *parrhesiasticism* in a previous article, *Le courage de la vérité: l'ascète, le révolutionnaire et l'artiste* (Foucault, 2008). In that text, he analyzed *parrhesia* as a courageous attitude in telling the truth – from the experiences of early Christian asceticism in the first three centuries of our era to the protests against the ostentatious and arrogant lifestyle of the ecclesiastical hierarchy in the Middle Ages.[121] He also found *parrhesia* in the rebellious attitudes of leaders

120 These words are found in *Lives of Eminent Philosophers* (trans. R. D. Hicks), by Diogenes Laertius (1972), in book IX, chapter 11, paragraph 72 (n.p.), referring to Pyrrho.

121 One can also cite the exemplary life of poverty of Francis of Assisi (1182–1226), and later, the reform movement of Luther in the 16th century.

of nineteenth-century revolutionary movements who opposed dictatorial and authoritarian regimes – an opposition that often cost them persecution or even their lives. What deserves attention here, however, is how Foucault also identified *parrhesiastic* expressions in the realm of literature and art.[122] His considerations in this area serve as the starting point for this chapter, introduced through two examples.

Drawing on the phrase attributed to the pre-Socratic thinker Democritus – cited in the epigraph of this section – regarding truth in a well, the painter Jean-Léon Gérôme created a canvas in 1896 depicting a naked young woman emerging from a well.[123] She appears frightened by the extent to which lies have spread across the world and is armed with a whip to pursue and punish the liars.[124] The painting was titled *La Vérité sortant du puits armée de son martinet pour châtier l'humanité* ("The truth coming out of the well armed with her whip to punish humanity"). It presents a permanent struggle between truth and lies in various spheres of social life – from personal conversations to social networks and the media.

This topic of truth can be emphasized in different ways. Xenophanes, for instance, denies the possibility of attaining truth altogether. Democritus

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122 "I believe that it is especially in modern art where the issue of cynicism has become particularly significant. The artist's life, in the very form it takes, must constitute a true testimony of what art is in its truth. Art is capable of giving existence a form that breaks with all others – a form that is that of true life" (*Je crois que c'est surtout dans l'art moderne que la question du cynisme devient singulièrement importante. La vie de l'artiste doit, dans la forme même qu'elle prend, constituer un certain témoignage de ce qu'est l'art en sa vérité. L'art est capable de donner à l'existence une forme en rupture avec toute autre, une forme qui est celle de la vraie vie*) (Foucault, 2008, p. 58).

123 Jean-Léon Gérôme (1824–1904), a prolific French painter and sculptor, kept close to him until his death this painting about the *Truth*. It is currently held at the Anne de Beaujeu Museum in Moulins, France. The painting is available at: https://lunettesrouges1.wordpress.com/2010/11/02/la-verite-sortant-du-puits-armee-de-son-martinet-pour-chatier-lhumanite/

124 On some social networks, one finds an expanded allegorical interpretation of Gérôme's painting, emphasizing the defeat of truth: "The Lie said to the Truth: Let us take a bath together, the water of the well is very pleasant. The Truth, still suspicious, tasted the water and found it was really pleasant. So, they undressed and bathed. But suddenly, the Lie jumped out of the water and ran off wearing the Truth's clothes. The Truth, furious, came out of the well to retrieve her garments, but the world, upon seeing the naked Truth, turned away with contempt. Ashamed, the Truth returned to the well and hid forever. Since then, the Lie travels the world dressed as the Truth, and society is content with it ... because people do not want to see the naked Truth" (Colangello, 2021).

expresses deep skepticism, portraying truth as always hidden or concealed at the bottom of a well. Gérôme's painting, by contrast, suggests a truth that – though frightened – is ready to confront falsehood. A similar emphasis appears in another painting on the same theme, created by Édouard Debat-Ponsan in 1898 and entitled *Nec mergitur ou la vérité sortant du puits* (see "Nec Mergitur ou la vérité sortant du puits", d'Édouard Debat-Ponsan, 1898, n.d., pp. 6–11). The painting was enthusiastically discussed by Émile Zola during the Exposition Universelle in Paris (15 April – 12 November 1900), where he proclaimed: "La vérité est en marche et rien ne l'arrêtera" (Debat-Ponsan, E., 1898, p. 5).[125] In Debat-Ponsan's version, truth struggles to emerge from the well while being attacked and restrained by a murderer and a clergyman – a metaphor for the forces attempting to suppress it.

The paintings by Gérôme and Debat-Ponsan reference the controversial case of Alfred Dreyfus (1859–1935), a captain in the French army who was wrongfully accused and convicted of handing over secret documents to the Germans. His Jewish identity contributed to the strong anti-Semitic sentiment that surrounded the case, which sparked a major public scandal in France and divided the country into Dreyfusards and anti-Dreyfusards. The truth of his innocence eventually prevailed – albeit only after years and despite two convictions.

Émile Zola's article "J'Accuse…", published in *L'Aurore* in January 1898 as an open letter to the President of the Republic, remains an emblematic act of journalistic *parrhesia*. In it, Zola defended Captain Dreyfus and accused several high-ranking officials of conspiracy and espionage. The case placed truths and falsehoods under public scrutiny, with conflicting interpretations and political consequences.

This chapter does not adopt the pessimistic view that truth is eternally hidden. Instead, it focuses on the perspective of truth as something that struggles to emerge in a world filled with lies – a process that requires courage, bravery and intelligence. In ancient Greece, one may observe the transition from *μῦθος* (myth – belief in divine intervention in human affairs) to *λόγος* (reasoned discourse – reflection and knowledge grounded in observation). This transition marks the origin of science – a method for

125 "The truth is on the move and nothing will stop it": Zola's image is not of truth trapped in a well, but of someone emerging from confinement to fight against lies: "*Ce qui fait si émouvante cette Vérité sortant du puits, c'est qu'on semble entendre devant cette toile le cri de conscience d'un honnête homme*" (Debat-Ponsan, 1898, p. 5).

analyzing the laws of nature and the dynamics of society – as noted by Sergio Alcántara Ferrer (2012), who masterfully argues that the origins of

> the interest in scientifically explaining the presence of human being on planet Earth go back fundamentally to the historical moment when the Greeks began their approach to a kind of reasoning different from the one that predominated previously. The key factor in this process of acquisition and learning by Greeks is a more rational way of thinking, the fact that some of them rejected myths, considered until then as the only option to explain their existence (Alcántara, 2012, p. 21)

The triumph of reason over myth gave rise not only to scientific thinking but also to a model of government grounded in popular sovereignty – *demos* and *kratos*. With science and political theory came the ambition to uncover the truth of things. Sabine (1939) supports this claim, noting that systematic political theory emerged with particular strength in Athens in the fourth century BC – marked by the appearance of Plato's *Republic* and *Laws*, and Aristotle's *Politics* (Sabine, 1939, p. 3).

However, over many centuries, social and political theory was eclipsed by theology. Scientific reasoning was subordinated to the dogmas of the Catholic Church – especially during the feudal period – when the only accepted truth was that which derived from the Bible, understood as the word of God. The rise of modernity and the rationalism of the seventeenth century – the second great moment of political theory – marked a return to knowledge through reason.[126] Yet even today, the truth remains elusive, as the struggle against falsehood continues as ever.

The search for truth

The Renaissance – as a new awakening on several levels – particularly in relation to the emergence of modern scientific thought, took shape alongside the collapse of feudalism in the sixteenth century (albeit as part of a longer process spanning several centuries) and the appearance of a new mode of production now known as capitalism. The method of modern science,

126 Sabine also identifies the second great period of political philosophy as extending to the 17th century, particularly in England with thinkers like Hobbes and Locke: "The second place was England, and the period was the half century between 1640 and 1690" (Sabine, 1939, p. 3). Rationalism during that century was spearheaded by Descartes, Spinoza and Leibniz.

which prioritized the senses, observation, and analysis guided by reason, re-emerged notably through the work of Copernicus, Kepler and Galileo – in contradiction to the dominant theology of the Counter-Reformation. Once again, science, politics and religion were entangled in a conflictual relationship. There was growing recognition that truth was not solely found in the Sacred Scriptures but could also be pursued through discursive reflection and human reason – a fundamental capacity. Philosophy began to distance itself from its previous role as *ancilla theologiae* (the handmaid of theology) to constitute an autonomous field.

The seventeenth century proved decisive, particularly with the rationalist thought of Descartes, Spinoza and Leibniz – although Malebranche (1638–1715),[127] in his *De la Recherche de la Vérité* (On the Search for Truth),[128] continued to emphasize the complementarity of divine reality and rational analysis, suggesting that understanding must overcome the continuous errors produced by the senses and imagination.

With Spinoza, one finds a clearer affirmation of the need for rational thought independent from the Scriptures – regarded as texts written by men – and also for the freedom to express one's ideas. However, the problem that persists in modernity, even as forms of government progressed from absolutism to liberalism, concerns the way in which truth can be attained. Once detached from the previously immovable platform of the word of God as found in the Bible, can it be assumed that the path to truth is now accessible? In this context, it is not only the courage associated with *parrhesia* that becomes necessary, but also the understanding and reasoning to determine what is to be said, and in which setting or form it may be appropriately expressed.

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127 Malebranche insisted on the profound harm caused by human error: "Error is the cause of men's misery; it is the evil principle that has produced evil in the world. It is what gave birth to and sustains in our soul all the evils that afflict us. We must not expect any solid and true well-being from it; we must seriously strive to avoid it" (*L'erreur est la cause de la misère des hommes; c'est le mauvais principe qui a produit le mal dans le monde; c'est elle qui a fait naître et qui entretient dans notre âme tous les maux qui nous affligent, et nous ne devons point espérer de bonheur solide et véritable qu'en travaillant sérieusement à l'éviter*) (Malebranche, 1842, p. 25).

128 *Recherche de la vérité* has the subtitle *Où l'on traite de la Nature de l'Esprit de l'homme, et de l'usage qu'il en doit faire pour éviter l'erreur dans les Sciences*. In this 1674–1675 work, Malebranche followed Cartesian rationalism, though he also marked key differences, as he later clarified in his 1678 *Éclaircissements sur la recherche de la vérité*, returning to a theocentric framework that sees all truths as stemming from a perfect God.

It is commonly accepted that science – through its experimental and theoretical method – constitutes the most reliable path. The pre-Socratic thinkers and the major Greek philosophers also saw reason as the route to knowledge. Yet the controversy surrounding geocentric and heliocentric theories in the sixteenth and seventeenth centuries illustrated the tensions that may arise between competing scientific paradigms. From the second century AD onwards, the Ptolemaic view – which held that the universe revolved around the Earth – dominated European thought for nearly fifteen centuries. Ultimately, however, the heliocentric model advanced by Copernicus and Galileo gradually gained acceptance, despite the Church's alignment with the Ptolemaic tradition and its attempts to buttress this cosmology with biblical narratives.

In a highly influential study, Thomas Kuhn (1996) questioned the permanence of scientific truths. In *The Structure of Scientific Revolutions*, he argued that scientific paradigms evolve through consensus formed within specific communities of thought. In the case of cosmology, it was Aristarchus of Samos who first proposed a heliocentric theory. This view was displaced by Ptolemy's geocentrism in the second century AD, then challenged by Copernicus and Galileo, until heliocentrism eventually gained predominance in the seventeenth century.

In an even more provocative manner, Feyerabend (1992) called into question the assumptions of contemporary rationalism. He asked whether the notion of a single, unified reason should be abandoned considering the possibility that different modes of reasoning might lead to distinct conceptions of truth. For Feyerabend, these truths are relative. He even raised the question of whether science functions more as a "political pressure group or a research instrument" (Feyerabend, 1992, p. 102). He rejected the idea that the scientific disciplines possess shared, essential characteristics that can be abstracted from the social and institutional practices that sustain them – going so far as to suggest that society may, at times, need to be defended against science itself.

Such reflections reveal that even within science, our conceptions of truth are subject to change. The theory held by the Greek atomists differs significantly from that of the twentieth century. If this is the case in science, how much more should one be cautious in accepting claims from religious or political fields as absolute? Indeed, varying conceptions of life and the universe continue to generate conflict – whether at local or global levels.

The so-called "Holy Land" in the Middle East remains a disputed territory – not only at the level of discourse but also in violent confrontations – because Christians, Jews and Muslims continue to assert their competing claims, each rooted in a conviction that the land was divinely granted to them.

In the twenty-first century, the proliferation of digital communication and social media has contributed to a striking pluralism of beliefs. One can now encounter theories of creationism – positing that the world was created in six days rather than through a process of evolution – alongside beliefs in extraterrestrial life on nearby planets, speculations that the moon does not exist but is a projection, claims that the 1969 moon landing was a hoax, or that the COVID-19 pandemic was part of a global conspiracy. Some maintain that the virus itself did not exist. Everyday news reporting is likewise shaped by distorted, fabricated or partial truths – circulated both by the media and through social networks – often with the aim of serving private interests or political agendas. In such a landscape, what matters less is truth itself than what has come to be known as post-truth – a concept that will be addressed in a later section.[129]

Many of the ideas and theories being disseminated today lack any scientific grounding. Yet they are nonetheless freely expressed by individuals who hold strong personal convictions. This phenomenon is not new. In the seventeenth century, for instance, Shabtai Tzvi proclaimed himself the true Messiah. The power of his claim resided not in evidence but in the fervor with which it was made. His declaration incited religious fanaticism not only among segments of the Jewish community but also among scholars and institutional leaders. Even after he converted to Islam,

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129 In 21st-century Mexico, under the presidency of Andrés Manuel López Obrador (beginning in 2018), freedom of expression has been strongly protected. Nevertheless, figures from the defeated opposition parties (PRI, PAN, and their PRD ally) have sought to flood society with fake news, including accusations such as "narco-president" and books like *El Rey del Cash*. A particularly striking moment came after Hurricane Otis struck Acapulco, Guerrero, on 25 October 2023. Journalist Carlos Loret de Mola falsely reported that 16 people had died due to poor conditions at an IMSS hospital. President López Obrador refuted this claim in a morning press conference on 27 October 2023: "It is part of the alienation in this world... because of these dehumanized systems where the means do not matter; the end justifies the means. You can lie, invent things, slander everything to destroy your opponent or for personal gain. It is a degradation of human nature when values are lost – when there are no ideals, no principles, and people no longer act with rectitude and integrity... It is a global issue, a global crisis – a lack of ethics, a lack of humanism" (Milenio, 2023).

many persisted in believing in him as the Messiah. In the current digital era – especially in political discourse – "it seems that lies and concealment are axes that articulate public life" (Muñoz Sánchez, M. T., 2020, p. 136). This same author poses a crucial question: "How will it be possible then to form a judgment on the political issues that concern us all?" (Muñoz Sánchez, 2020, p. 136). Or, to rephrase the problem:

> How can we appeal to the capacity for political judgment when we are daily bombarded by countless and implausible Donald Trump lies and by the force of fake news spread without the slightest shame and, in many cases, accepted as truths uncritically. And even more, just look at the newspapers to find a global context of concealment and lies in politics (Muñoz Sánchez, 2020, p. 136).

Thus, even within democratic liberalism – where freedom of expression is guaranteed – the fundamental question persists: how can truth be approached? This is not merely an epistemological issue. As in the sixteenth and seventeenth centuries, politics and religion are still regularly interwoven in practice. On one side, there are those who – drawing on Aristotle – view human beings as essentially social creatures and, accordingly, believe that all citizens should participate in public life for the benefit of the community. On the other side, others adopt a more conflictual view – informed by Machiavelli's observations of sixteenth-century Italy – seeing politics as a domain of relentless struggle among individuals and groups, driven by the desire to consolidate and expand power by any means available, including lies, slander, manipulation and even murder. Where, then, is truth to be found?

In the field of religion, some schools of thought have anticipated its eventual disappearance with the rise of rationalism, arguing that the central tenets of faith – such as the immortality of the soul, divine miracles, or the existence of heaven, hell, or purgatory – are impossible to prove – although, from a theological standpoint, Limbo need not concern us anymore, given that the Church officially abolished it in 2007.[130] Spinoza's position remains

130 In the 5th century AD, Augustine of Hippo (364–430) opposed Pelagius, who argued that God could not condemn those who had not sinned, by asserting that all unbaptized people went to hell (*De peccatorum meritis et remissione et de baptismo parvulorum*). Gregory of Nyssa (330–400), in *De infantibus praemature abreptis libellum*, claimed that one should not assume such children go to hell or heaven. Thomas Aquinas proposed the idea of *limbus* (limbo) – a place neither heaven nor hell. This was later excluded from the 1992

pertinent here: he observed that human beings tend to turn to religion in the face of the inexplicable, finding in it a form of relief from life's difficulties. According to Spinoza, ecclesiastical hierarchies have long exploited this human inclination – manipulating it to the benefit of clerical elites. Yet this critique never led Spinoza to abandon religion altogether, despite accusations of atheism. He considered himself religious and a believer – though he affirmed a conception of God distinct from that upheld by institutional religion. Einstein later echoed this position with his well-known affirmation *Deus sive Natura*, affirming belief in divinity, though clarifying that it was Spinoza's God he embraced.

Today, it remains possible to distinguish between competing notions of God: one put forward by established institutions – such as the Roman Catholic Church – and another, for example, advanced by Liberation Theology, which emerged in Latin America in the late 1960s and identified God with the cause of emancipation for the poor.

Both politics and religion tend to promote their own truths – often with the social reinforcement of reward and punishment, in this world or the next. Democratic life must guarantee freedom of thought, as Spinoza insisted. However, the power of the State remains necessary in cases where the expression of opinion may give rise to actions that harm the common good. Science, through the development and specialization of disciplines, has undoubtedly deepened our understanding of nature and the world – but it must also be acknowledged that science may be mobilized to obscure truth or serve particular interests. Old and new knowledge alike can be exploited to construct what is now referred to as *post-truth*, defined by the Royal Spanish Academy as the "deliberate distortion of reality, which manipulates beliefs and emotions in order to influence public opinion and social attitudes".[131]

Claudine Tiercelin (2023) has offered a well-argued and suggestive study in her book *La post-vérité ou le dégoût du vrai*, proposing a thesis that

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Catechism of John Paul II, and in 2007 Pope Benedict XVI formally abolished the notion, affirming that unbaptized children can attain eternal salvation.

131 According to the Royal Spanish Academy, the term *post-truth* has a simple, classic definition. The term was first used by Steve Tesich in an article published in the Argentine magazine *La Nación* (2017), referring to the Iran–Contra affair and the Gulf War: "I regret that we, as a free people, have freely decided to live in a world where post-truth reigns." See www.thenation.com/archive.

deserves serious attention. Post-truth, she argues, has gained extraordinary force in the 21st century – presenting distorted facts and analyses in ways that mask what may in fact be occurring. It is embraced by many who, quite literally, reject truth out of disgust (*dégoût*). But this condition should not be normalized. One need not resign oneself to permanent skepticism or confusion. Rather, it is essential to cultivate epistemic virtues and a scientific spirit. Academic and democratic spaces must be developed to enable reasoned debate – as a way of approaching what is actually unfolding in historical processes. Tiercelin's reflections stem from her 2017 seminar *Connaissance, vérité et démocratie* at the Collège de France, where she advocated resisting *post-vérité* through the creation of arenas for argument, discernment, and critical confrontation. This converges with what will later be discussed as deliberative democracy, based on the thought of Habermas (1999).

Closely associated with post-truth is the phenomenon of fake news. These are not merely biased interpretations of events, but deliberate fabrications – or events strategically manipulated so that they appear either exaggerated, minimized, or even nonexistent, depending on the communicator's aims or the interests of the group they represent.

It is useful to recall here the term *paparrucha*, which appeared as early as 1884 in the Dictionary of the Royal Spanish Academy (DRAE), with a meaning closely aligned to post-truth: nonsense or a baseless rumor that spreads widely.[132] We live in a world with remarkable access to information – and yet truth has become harder to distinguish. During electoral periods in particular, many actors seek to enhance the image of some while discrediting others.

Leibniz, in the 17th century, proposed several types of truth: absolute, contingent, and hypothetical. These are not equivalent, but all must submit to the logic of reason and be demonstrable – ideally in numerical or formal terms. In his view, a true proposition must be verifiable through a logical sequence of coherent, non-contradictory steps, because "every true proposition can be proven" (Leibniz, 1986, p. 40). Yet he also acknowledged

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132 Charles Dickens placed the word *paparrucha* in the mouth of his character Ebenezer Scrooge in the 1843 novella *A Christmas Carol*, when Scrooge dismissed the greetings and goodwill of the season as "nonsense." The Royal Spanish Academy defines *paparrucha* as "false and absurd news of an event, spread among the common people" and also as "foolishness, stupidity, insubstantial and absurd thing."

that such a process might extend indefinitely: "no proposition could be perfectly demonstrated by reason" (Leibniz, 1986, p. 41). This implies that one continually approaches truth asymptotically – always nearing, never attaining it in full. Hence the value of ongoing critical reflection and debate in determining the comparative strength of competing arguments.

What one observes in the contemporary world is not so much a progressive uncovering of truth, but rather the systematic deployment of strategies for its concealment – coupled with the deliberate spread of falsehoods. In today's democracies, freedom of expression is upheld – but that freedom must be exercised with discernment. Not everyone engages in sustained reflection on the truth claims they encounter. Spinoza had already warned that the *plebs* – the vulgar – are often guided more by sensation and emotion than by reason.

In practice, most of the information received – whether directly from friends and acquaintances or indirectly via television, radio and digital media – originates in opinions that may be serious or absurd. They often blur the boundaries between truth, post-truth and *paparrucha*. With or without malicious intent, we are all exposed to news and commentary that may lead us closer to – or further from – truth.

This also applies to those who sincerely seek to speak their truth. Freedom of speech does not, by itself, guarantee proximity to reality. *Parrhesia* – the courage to speak openly – remains a valuable democratic virtue, but one that is not without complications. As Konstan (2012) notes: "The virtue of *parrhesia*, like most virtues, is subject to abuse when taken to extremes. Too little frankness can be seen as cowardice or hypocrisy, but too much can be seen as insolence" (p. 2). Thus, freedom of expression entails many layers – and responsibilities.

In this context, the insights of Hannah Arendt (2019) offer critical perspective – especially regarding the political sphere, where discernment is essential:

> No one has ever doubted that truth and politics never got along too well, and no one, as far as I know, has ever put truthfulness among political virtues. Lying was always seen as a necessary and justifiable tool not only for politicians and demagogues but also for that of the statesman (Arendt, 2019, p. 1).

Arendt's analysis of lies and truth applies directly to public policy. Two of her texts – *Truth and Politics* (Arendt, 2017) and *Lying in Politics* (Arendt,

1972) – are especially illuminating. In the first, she makes clear that politics and truth have always been in tension. For Arendt, power is generally indifferent to truth. The second essay takes this further, offering a historical account of the American government's campaign during the Vietnam War in the 1970s. Despite the reality that the United States was losing the war, official discourse sought to portray it as a triumphant intervention against the threat of communism. A similar rhetorical strategy was used to justify the 1954 overthrow of President Árbenz in Guatemala.[133] Decades later, President Reagan invoked the same specter of communism to legitimize U.S. intervention in Central America – referring to Cuba (after the 1959 revolution), Nicaragua (following the 1979 Sandinista victory), and El Salvador as parts of a growing "evil empire" that threatened even the United States. More recently, a comparable strategy can be observed in President Biden's 2022 discourse on Russia and the war in Ukraine. This effort to portray President Putin in wholly negative terms functions, in part, to deflect attention from previous U.S.-led interventions – in Iraq, Libya, and the ongoing presence in Syria. Beneath these narratives lies a broader struggle between truth and post-truth – played out in the media, think tanks, and social networks.

Arendt affirms that there is a permanent conflict between truth and politics – above all because there are facts, or interpretations of facts, that contradict the interests of particular groups. Since liberal governments rely heavily on public opinion – especially in electoral cycles – there is a constant tendency to shape favorable opinions about those in power. This translates into efforts to praise and promote opinions that validate government actions, while branding as falsehoods anything that challenges their legitimacy. In such contexts, opinion often matters more than truth. Arendt recalls James Madison's remark: "All governments rest on opinion" (Arendt, 2019, p. 6). Politicians, then, are not generally concerned with *epistēmē* (objective

133 The US government under President Dwight Eisenhower used this same lie about the threat of communism to overthrow the democratically elected president of Guatemala, Jacobo Árbenz, in 1954. Mario Vargas Llosa (2019), in his historical novel *Tiempos recios* (*Hard Times*), describes the full extent of the plot orchestrated by Secretary of State John Foster Dulles, CIA director Allen Dulles, and the US ambassador to Guatemala, John Peurifoy. They hired mercenaries from Honduras and received support from the Somoza dictatorship in Nicaragua and Trujillo's regime in the Dominican Republic. The entire narrative about Árbenz's supposed communism was fabricated to defend the interests of the United Fruit Company, threatened by the Guatemalan government's agrarian reform project.

knowledge, reasoned understanding), but rather with *pistis* (belief, persuasion), or even *doxa* (opinion or apparent knowledge) – categories already formulated by Parmenides and later systematized by Plato.

Indeed, with the pre-Socratic thinkers, the groundwork was laid for disciplines such as astronomy, philosophy, history, medicine and geography – all understood as ways of accessing truth through observation and methodical analysis, independently of religious authority. Some thinkers – like Aristotle – crossed disciplinary boundaries, serving as philosophers, astronomers, biologists, physicists, historians and economists. While science would later lose much of its status for centuries, it re-emerged with vigor in the 16th and 17th centuries and achieved near-universal methodological prestige in the 20th and 21st. Nevertheless, not even science can guarantee absolute truth – since many of its hypotheses are constantly revised and subject to public debate.

New knowledge continues to emerge as older certainties are overturned. In liberal democratic governments, which rely on majority opinion to produce electoral outcomes, hegemonic political actors often seek to influence public ideas and beliefs. In the digital age – with unprecedented technological advancement and data saturation – it becomes increasingly difficult to locate truth. Political discourse, in particular, seems characterized by endless debate over interpretations of social facts, generating a climate of persistent confusion among truth, post-truth, and absurdity. In this landscape, the pursuit of truth remains urgent – yet complex and elusive.

It is worth recalling one of the major contributions of Ludwig Wittgenstein (1889–1951) – specifically his final work, *On Certainty* (*Über Gewißheit*) (Wittgenstein, 2023). Wittgenstein was undoubtedly familiar with Spinoza's works – as Oliver Scoffield (2023) notes, the title of Wittgenstein's *Tractatus Logico-Philosophicus* deliberately echoes Spinoza's *Tractatus Theologico-Politicus* (TTP).[134] Nonetheless, it is important to distinguish between the two main phases of Wittgenstein's thought: his early work (*Tractatus*) and his later work (*Philosophical Investigations*). The former posits a direct correspondence between language and reality, rooted in logic; the latter focuses on the social and contextual conditions in which language is employed, and how these shape our acceptance of certain statements as true.

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134 Wittgenstein's foundational philosophical work, *Tractatus Logico-Philosophicus*, pays homage to Spinoza's *Tractatus Theologico-Politicus* (Scoffield, 2023). Amartya Sen refers to Wittgenstein as "the leading philosopher of our Age" (Sen, A., 2016, p. 261).

On Certainty – written in the last two years of Wittgenstein's life and completed just two days before his death on 29 April 1951 – was left unpublished by the author, who did not have time to revise or prepare it. Composed of 676 propositions, it was published posthumously in its final version. In this text, Wittgenstein explores the difficulty of reaching truth through language – yet he does not renounce the search for valid certainties, even in the face of radical doubt. One can observe here the influence of G. E. Moore's *A Defence of Common Sense* (1925), which argues that reasoned common sense offers a foundation for truth. Wittgenstein, however, poses many challenges to this stance – especially when it is grounded solely in sensory data. As he puts it: "Just because a thing appears to me – or to everyone else – in one way, it does not necessarily follow that it is that way" (Wittgenstein, 2023, p. 2).[135] It is therefore legitimate to question the truth of any assertion. A degree of skepticism is necessary in the face of so many appearances and falsehoods. Yet excessive skepticism risks leading to a state in which belief in anything becomes impossible.

Historically, skepticism became a defined philosophical current. Pyrrho of Elis (360–270 BC), often regarded as the first skeptic, developed a doctrine later adopted by Aenesidemus (80–10 BC),[136] who authored the *Pyrrhonian Discourses*, emphasizing the impossibility of attaining truth. Sextus Empiricus (160–210 AD), a Greek physician and philosopher, elaborated skeptical arguments in his *Outlines of Pyrrhonism* and *Adversus Mathematicos (hoc est, adversus eos qui profitentur disciplinas)*, where he critiqued Epicureanism and advocated for the suspension of judgment, asserting that all arguments to express an affirmation are ultimately deficient.

Although Wittgenstein's early *Tractatus* defended the capacity of language to express reality, he later altered his stance. In *Philosophical Investigations*, he argued that language can distort appearances, and that truth must be approached with attention to the context in which statements are made. This second position is reaffirmed in *On Certainty* (*Über Gewißheit*), where he engages with aspects of skepticism – in the sense

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135 "*Daß es mir – oder Allen – so scheint, daraus folgt nicht, daß es so ist*" (Wittgenstein, 2023, p. 2). This expresses the permanent doubt one may harbor toward all linguistic expressions that surround us. The essential question remains valid: is what I hear or read true? This perspective does not equate to full skepticism, which denies the very existence of truth.

136 Diogenes Laertius (1972, book IX, chapter 11, *Pyrrho*, 360–270 BC) offers a detailed account of this school of Greek sckepticism, mentioning both Pyrrho and Aenesidemus of Knossos, the latter hailing from the island of Crete.

that true knowledge is unreachable – but clearly proposes the concept of asymptotic approach to truth already pointed out by Leibniz, which distances him from the school of skeptics. Like Leibniz, Wittgenstein accepts that truth may be approached asymptotically – always approximated, never fully grasped. Nor does Wittgenstein align himself with dogmatism, which already had been dismantled on account of its alleged religious connection with the Scriptures and the divine word and had also been rejected by its intention to proclaim absolute truths based on clear and distinct ideas such as deductive inference – as in Descartes' view that there are self-evident truths immune to doubt. Wittgenstein seems to propose a third path, one that resists both dogmatism and skepticism.[137]

As Garber (2007) notes, "what could be interpreted in the light of *On Certainty* [is] that we are trained to admit and remain in a system of certainties", when in relation to truth, knowledge is always a constant search with progressive approaches, but we never manage to absolutely possess them. This resonates with Dewey's analysis in *The Quest for Certainty* (1929), where he revisits the Greek distinction between knowledge (*gnōsis*, *epistēmē*) and opinion (*doxa*). For Dewey, "knowledge corresponds to the realm of true reality while belief, on the contrary, is only opinion" (Dewey, 1929, p. 18). He further maintains that "the exaltation of pure intellect and its activity above practical matters is fundamentally connected with the search for a certainty that must be absolute and immovable" (Dewey, 1929, p. 6). In this framework, knowledge – rather than myth, ritual or religious belief – is what grants access to certainty. But achieving this remains difficult.

Whereas Descartes and Dewey place considerable faith in reason, Wittgenstein remains cautious. He acknowledges our desire for certainty but insists that everyday convictions arise not from reason alone but from lived experience, shaped by a personal and collective *Weltbild* (worldview), where not everything is based on reason because myths still exist. Certainties that direct our lives are not derived from absolute knowledge, but from historical context, which varies for individuals and social groups and can be modified in time and space.

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137 Extreme relativist positions can still be found. For example, Benson Mates (1981), in *Skeptical Essays*, presents a radical relativism, arguing that all arguments in a discussion can be valid, as each person has their own reasons for their opinions. Likewise, Paul Feyerabend (1989), in *Adieu la raison*, attempts to invalidate the notion of absolute truth, proposing that every individual may possess their own rational framework for belief.

> The image of the world of a community of speakers is the product of the practices acquired or learned by the mere fact of being born and growing up in it, that is, of the way of life corresponding to that community. The ways of life of communities in a culture or from one culture to another, change historically and, therefore, the images of the world change accordingly (King Dávalos, 2013, p. 35).

Such a vision of the world, with its beliefs and certainties, may not be far from mythological thinking. Wittgenstein (2010) states literally: "in our speech there is a total mythology" (Wittgenstein, 2010),[138] referring to the extensive book *The Golden Bough, A Study in Magic and Religion*, by Sir James Frazer (1925), who describes the lives of primitive ancestors – their sexual practices, strange rituals, festivals, and forms of religious praise. In this way, the certainties that guide our ethical behavior are not based exclusively on reason – neither before nor now – although they are what give meaning to our lives, regardless of their often-mythological content.

What can be highlighted, then, is that our certainties – like the shifting scientific truths described by Thomas Kuhn (1996) – change according to the historical circumstances surrounding us at each time and place, and are not necessarily based on reason:

> I do not have my world vision because I have convinced myself that it is correct. On the contrary, it is the background that is given to me; rather, it is the traditional background on which I distinguish between the true and the false (Wittgenstein, 2023, pp. 15–16).[139]

This background may derive from local culture, authority, family tradition, and similar sources. As Wittgenstein further states: "I have learned many things which I took on the basis of human authority, although I have subsequently seen them confirmed or found to be worthless through my own experience" (Wittgenstein, 2023, pp. 24–25). Everything experts

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138 "*In unserer Sprache ist eine ganze Mythologie niedergelegt*." Original in Wittgenstein (2010).

139 "*Aber mein Weltbild habe ich nicht, weil ich mich von seiner Richtigkeit überzeugt habe; auch nicht, weil ich von seiner Richtigkeit überzeugt bin. Sondern es ist der überkommene Hintergrund, auf welchem ich zwischen wahr und falsch unterscheide*" (Wittgenstein, 2023, pp. 15–16). This distinction between true and false is not necessarily governed by reason, but often by inherited beliefs and values.

say – in books, geography, and so forth – must be confirmed by our own experience and by our historical context.[140]

Wachtendorf (2013) offers a particular interpretation, attempting to clarify Wittgenstein's notes on the mythology underlying our language:

> In relation to this set of certainties, Wittgenstein does not speak of a worldview that I have, '... because I have convinced myself of its correctness; nor because I am convinced of its accuracy. But it is the traditional background against which I distinguish between true and false'... As soon as people talk to each other, a worldview – a set of shared assumptions – is a necessary prerequisite without which judgment would not be possible. Wittgenstein continues: 'The sentences that describe this worldview could belong to a kind of mythology (Wachtendorf, 2013).

Wittgenstein's conception, as expressed in *On Certainty*, is something that must be considered in relation to freedom of expression in democratic models. It is one thing to express convictions freely, and another to assume that everything expressed or heard is true. Yet if truth is unattainable, adopting a purely skeptical stance – doubting everything – is also unviable. It remains possible to base opinions on reasoned discussion and to reach shared, agreed certainties from which meaningful life projects can emerge: "Wittgenstein maintains that there are certainties that all speakers have them embodied in our contextual practices" (King Dávalos, 2013, p. 34) These certainties, however, may shift depending on time and circumstance. Forster (2023), in *Wahrheit in Wittgensteins Spätphilosophie*, offers a compelling account of Wittgenstein's concept of truth in his later period. He argues that everything depends on our worldview (*Weltbild*) in specific contexts:

> The worldview is the normative and, under normal circumstances, both unquestioned and unrealized most fundamental epistemic framework of our

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140 Wittgenstein elaborates: "*Ich habe eine Unmenge gelernt und es auf die Autorität von Menschen angenommen, und dann manches durch eigene Erfahrung bestätigt oder entkräftet gefunden. Was in Lehrbüchern, der Geographie z. B. steht, halte ich im allgemeinen für wahr. Warum? Ich sage: Alle diese Fakten sind hundertmal bestätigt worden. Aber wie weiß ich das? Was ist meine Evidenz dafür? Ich habe ein Weltbild. Ist es wahr oder falsch? Es ist vor allem das Substrat alles meines Forschens und Behauptens. Die Sätze, die es beschreiben, unterliegen nicht alle gleichermaßen der Prüfung*" (Wittgenstein, 2023, pp. 24–25).

> relationship to reality, which we all recognize within our language games and the individual (language) actions that go with them. It represents a 'system of evidence' and 'our verification' which, in the case of our worldview, is determined primarily by certainties of a mathematical-scientific view and can be considered the substratum of all [our] investigations and assertions. This can be summarized with Wittgenstein: the worldview is 'the traditional background against which I distinguish between true and false'. As a 'reference system', it is a precondition for reaching a possible agreement about truth or falsehood (Forster, 2023).

This conception may always involve a certain relativism and doubt regarding specific truths, but not absolute skepticism. Individuals always possess certainties and can reconsider them with adequate reasoning and based on the perception of surrounding historical circumstances. This leads, for instance, to the thesis of Humberto Maturana on the impossibility of total objectivity in the social sciences, due to the difficulty of separating the subject – with all their values and prejudices – from the object of study – society, which is constantly evolving.[141]

Michel Löwy (1974) similarly refutes positivism, identifying three key components in his analysis: first, the partial identity between the subject and the object of knowledge; second, the fact that social problems must be analyzed from the perspective of subjects belonging to different social classes – the worldview of an exploited worker is not the same as that of someone in a powerful position within global capitalism –; and third, the necessary consequences of expressing truth from a class standpoint with which conflicts are interpreted.

In Latin America, the existence of diverse worldviews and political trends that periodically achieve electoral success indicates that the democratic model adopted – provided elections are legitimate – reflects a temporary popular dominance by the left, right, or center, or by progressive or conservative positions. Hence, in the 21st Century, and more specifically in 2025, there are administrations shaped by different ideological currents such as those of presidents Gustavo Petro in Colombia, Lula da Silva in

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141 See Alexander Ortiz Ocaña (2017), "Objectivity in the human and social sciences? Reflection on Humberto Maturana's work", where – following Kuhn (1971) – he argues that since scientific ideas themselves evolve, social sciences are also marked by a high degree of subjectivity. This is due to the fact that researchers are part of the living, changing societies they analyze, where objective reality is constantly entangled with perceptions of reality.

Brazil, Claudia Sheinbaum in Mexico, Xiomara Castro in Honduras, Yamandú Orsi in Uruguay and Luis Arce in Bolivia (finishing his term). There are also contrasting visions like those of Santiago Peña in Paraguay, Daniel Noboa in Ecuador and Javier Milei in Argentina.

In practice, it is not reason alone that determines voting outcomes in these countries, but a set of beliefs about possible futures – easily spread through mixtures of objective data, myths, and post-truths via media and social networks. This is reminiscent of ancient Greek assemblies: a community may decide one course of action today and revoke it the next, adopting a different one. Therefore, election results can lead to ruptures in a government's political line, depending on whether conservatives or progressives hold power.

Returning to the issue of freedom of expression in contemporary Western democracies, this is already a right – and, in practice, a fact. Therefore, the real struggle within these democratic models must unfold in the cultural domain of public debate: to ground our beliefs and strive for certainties that may robustly shape our worldview. This will be a fundamental step toward enhancing the quality of democracy. The educational mission set forth in Plato's myth of the cave remains relevant: a constant effort to lead those chained in darkness toward the light.

An interdisciplinary vision of the scientific process

Science began in ancient Greek times with the development of disciplinary fields, many of which have persisted until today. Specialization in a discipline, through the careful observation and analysis of nature and social life, was regarded as the best method for approaching truth, as opposed to religious myths. Economics, for instance, has been known in the history of science since the 7th century BC, when Hesiod introduced the concept of *oíkos* along with *nómos*, later expressed by the Romans as *oeconomia*. History also emerged in the Greek world with Herodotus and Thucydides, alongside philosophy in the pre-Socratic period, as well as disciplines like astronomy, geography, medicine, and politics. Thus, scientific tradition recommends beginning with a disciplinary focus. Even during the feudalism of the Middle Ages, when the first universities were founded, the model of specialized knowledge divided into disciplines was established.

In modern basic education – including secondary and preparatory levels – a holistic understanding that integrates multiple disciplines is encouraged. However, when seeking scientific training through higher education, one must usually choose a single field of specialization.

Yet, even in classical antiquity, there were scientists who addressed multiple disciplines simultaneously. Aristotle, for example, is credited with approximately 200 works on diverse subjects, though only 31 are preserved. His writings spanned philosophy, politics, physics, astronomy, biology, rhetoric, aesthetics, ethics, logic, psychology, meteorology, zoology, and metaphysics. Similarly, in modern times, Wolfgang von Goethe (1749–1832) left behind a legacy encompassing poetry, novels, drama, and scientific studies in biology, chemistry, and medicine. Further examples can be found among thinkers of the 19th, 20th and 21st centuries who have integrated knowledge across disciplines: Karl Marx (1818–1883) was simultaneously a philosopher, economist, political theorist, and historian; Teilhard de Chardin (1881–1955) a theologian, philosopher, and paleontologist; Norbert Elias (1897–1990) combined medicine and sociology; Humberto Maturana (1928–2021) and Francisco Varela (1946–2001) merged medicine, biology, and social science in works such as *Of Machines and Living Beings* and *The Tree of Knowledge*. Norbert Wiener (1894–1964), after studies in zoology and philosophy, ultimately defined his career through mathematics and founded the field of cybernetics – inspired by his research on ballistic control during World War II.

Edgar Morin (b. 1921), having studied history, geography and law, and incorporating philosophy and sociology, developed his theory of complex thought and the need for interdisciplinarity, always maintaining awareness of both the holistic vision and the specificity of each part comprising a whole. Similarly, Pablo González Casanova (d. April 2023) combined knowledge gained through a law degree, a master's in historical sciences at UNAM, and a doctorate in sociology from the University of Paris. He later served as director of the Center for Interdisciplinary Research in Sciences and Humanities (CIICH).

In general, human beings are limited – by their short lives and by the finite knowledge they can acquire – and thus specialization in a single discipline has long been favored in order to master a field.[142] The division into disciplines

142 Even in sports, despite efforts to promote multi-sport disciplines like triathlon or quadrathlon, there is a persistent push towards specialization. In American football, Patrick Mahomes –

has been essential for the advancement of scientific knowledge, as without specialization, progress is difficult. Yet interdisciplinarity, through teamwork, dialogue and discussion, has proven to be a more effective method for approaching truth. Although there are exceptional individuals capable of mastering multiple disciplines, the prevailing norm is still disciplinary specialization – professions remain defined by their fields of expertise.

This raises a fundamental question: is it preferable to specialize in a single discipline or to pursue a holistic and global perspective? Is it necessary to adopt a single scientific lens, or is it possible to integrate contributions from multiple fields? Both approaches – disciplinary specialization and a global worldview – are valuable. However, for most people, having both is likely unachievable.

Furthermore, once new knowledge is obtained, should it be understood as serving all of humanity or as a resource benefiting only a few elite groups who claim authority over scientific interpretation? Can science deliver absolute truths, or might it also distort reality? In a contemporary world characterized by overwhelming amounts of information, can objective facts be confused with post-truth – a distorted view of the world?

Interdisciplinarity as a form of teamwork continues to prove a superior method for approximating truth. Since not every individual possesses interdisciplinary capabilities, the recommended approach is to form working groups composed of scholars from different disciplines who analyze and discuss facts concerning the social world, listen carefully to diverse perspectives, and work toward consensus. Having such discussion groups is a significant advantage.

Nevertheless, it is important to note a critical phenomenon emerging in the second half of the 20th century: the appearance of large thought laboratories, the so-called 'think tanks', which aim to concentrate major scientific advances and present them through a perspective claimed to be singular and true, for use in shaping government public policies. These interdisciplinary institutions are remarkable for the scale of resources

quarterback of the Kansas City Chiefs – was contractually prohibited from playing basketball or baseball after 2018, in order to devote himself entirely to football. This dedication led him to win Super Bowl LIV in January 2020. However, specialization was no guarantee of continued success: he lost Super Bowl LV to Tom Brady's Buccaneers in 2021, failed to reach Super Bowl LVI in 2022 after losing the semifinals to the Cincinnati Bengals, and lost again in Super Bowl 2025 to the Philadelphia Eagles. Nonetheless, perseverance led him to further victories against the 49ers in 2020 and 2024, and against the Eagles in 2023.

invested in them, but they have also become subordinated to governmental and private interests. As a result, they have spread dominant ideologies that sometimes serve international agendas, obscuring the truth and promoting post-truth narratives in an attempt to align global processes with the economic interests of large corporations.

In the mid-twentieth century, during the Second World War, there was "a retreat in the tendencies of construction of disciplinary boundaries and, at the same time, a resurgence of holistic paradigms of knowledge" (Bottazzi et al., 2019, p. 10). Governments directly intervened in shaping the production of scientific knowledge, challenging the dominance of disciplinary approaches. While the professionalization of research through single-object specialization and defined epistemological perspectives offered certain advantages, such compartmentalization risked fragmenting knowledge and failing to address the complexities of the modern world.

During the second World War, dialogue between scientists of different disciplines became imperative. The urgency of formulating effective military strategies demanded decisions that transcended the isolated opinions of individual experts. It was not sufficient for specialists to simply contribute insights from within their fields and then return to solitary work. Rather, they were required – geographers, economists, physicians, biologists, sociologists and others – to come together and discuss concrete problems collectively. The aim was to forge consensus and determine the most effective course of action. Specialists needed to persuade one another, adapt their positions, and accept input from colleagues in other domains in order to arrive at workable strategies.

The interdisciplinary perspective thus spread throughout the second half of the twentieth century, extending to many other areas of knowledge. It became widely recognized as a superior method for approaching truth through collective effort. With the support of governmental institutions, team-based research and collaboration between professionals from different disciplines intensified. This emphasis on collaborative work is reflected year after year in the achievements of Nobel Prize recipients.

Originally established through Alfred Nobel's 1895 will, the Nobel Prizes were created to reward excellence in physics, chemistry, medicine, literature, and the pursuit of world peace. The field most closely aligned with the social sciences – other than literature – is economics, though a dedicated Nobel Prize in this discipline did not exist until 1968. In recent

decades, this prize has increasingly been awarded to teams of researchers. In 2021, the Nobel Prize in Economic Sciences was awarded to a trio – David Card (Canada), Joshua Angrist (USA), and Guido Imbens (Netherlands) – for groundbreaking reforms in "empirical work in economic sciences," particularly in employment and migration studies.[143]

Still, Nobel Prizes should not be viewed as infallible indicators of scientific excellence – whether disciplinary or interdisciplinary. Their awarding has often been subject to political controversy. The Nobel Peace Prize has, at times, been bestowed upon contentious figures, such as Henry Kissinger (1973), despite his involvement in the bombing of Cambodia and support for apartheid regimes in South Africa; Barack Obama (2009), despite deploying troops to Afghanistan, Iraq and Syria; Shimon Peres (1994), while overseeing repression of Palestinians; and Aung San Suu Kyi (1991), despite the persecution and massacre of Myanmar's Rohingya minority.

Even in scientific disciplines, Nobel awards have drawn criticism. On 30 June 2016, 110 Nobel Laureates in medicine, chemistry, physics and economics issued a public statement attacking Greenpeace's environmental positions and defending genetically modified organisms (GMOs). Notably, many of the signatories were affiliated with companies producing GMOs (Toledo, 2016).

Nonetheless, the growing prevalence of team awards in recent years reinforces the value of interdisciplinary collaboration. In 2019, Abhijit Banerjee, Esther Duflo and Michael Kremer were awarded the Nobel for research on the causes and remedies of poverty. In 2020, the prize went to Paul Milgrom and Robert Wilson for auction theory based on game theory. In 2021, Joshua Angrist, David Card and Guido Imbens were recognized for experimental innovations in economic theory.[144]

A historical variant of institutionalized interdisciplinary research is the founding of the Santa Fe Institute in 1984 in New Mexico. This organization sought to integrate molecular biology and computer science toward

143 This information is sourced from *BBC Mundo* and *El País* (Fariza, 2021), including the 2021 Nobel Prize in Economics.

144 The 2021 laureates were recognized for their outstanding empirical research and experiments. Their work analyzed, among other things, the effects of raising the minimum wage on unemployment – challenging mainstream predictions of job losses. Angrist and Imbens, in particular, used causal analysis to disprove the common belief that higher education necessarily leads to higher income. Their research was characterized by close collaboration and co-authored publications.

specific ends. With an initial investment of nearly four million dollars and partnerships with institutions such as Princeton, Stanford, Yale, Rutgers, Boston University, and research centers like Los Alamos, Caltech and AT&T Bell Labs, the Santa Fe Institute brought together prominent scientists, including four Nobel laureates (P. Anderson, K. Arrow, M. Eigen and M. Gell-Mann). The effort exemplified how government and private sectors – especially in industrial and military contexts – funded interdisciplinary teams not only to advance knowledge but also to promote particular ideological or political interests.

The Santa Fe Institute illustrates the global importance of group-based research through the development of think tanks – intellectual laboratories tackling pressing social challenges. Examples include the Future Institute, the Russell Sage Foundation, the National Bureau of Economic Research, the Fabian Society, the Institute of Economic Affairs, the Konrad Adenauer Foundation, the Adam Smith Institute, and the RAND Corporation. RAND, in particular, has become a benchmark model. Although originally connected to the United States Department of Defense, its research agenda has expanded to cover economic and social issues, and it currently employs approximately 500 researchers. Its guiding principle, *Ideas have consequences*, encapsulates its mission to generate knowledge that informs global solutions.

The boundaries between think tanks and other research institutions are not always clear, especially as they vary in size and structure. Estimates suggest that around 1,500 such organizations exist worldwide, with approximately 1,200 based in the United States. Originating during the Second World War, think tanks were initially focused on military strategy but soon broadened their scope to address post-war reconstruction and the formation of public policy. These institutions not only advised governments but also encouraged the participation of civil society organizations in public discourse.

Particularly in relation to economics and public policy, many research institutes were established in the subsequent decades to advocate lines of thought intended for implementation by government bodies and educational institutions. Although some of these think tanks have been tied to political parties or governmental funding, they often present themselves as neutral instruments of civil society – interdisciplinary collectives offering insight and solutions to economic and social issues. Their audience consists

primarily of policymakers seeking to ground their governmental projects in research-based recommendations.

Throughout recent history, many such think tanks contributed to the systematization and dissemination of neoliberal thought, especially in the latter half of the twentieth century. By promoting concepts such as the minimal state, free markets, and privatization, these institutions helped establish a dominant narrative presented as the only viable model for global economic stability. The power of their proposals stemmed not only from the quantity of interdisciplinary research produced but also from the way their ideas were framed – as the singular path forward. Margaret Thatcher captured this sentiment with the famous declaration: "There is no alternative". She herself

> was a regular assistant at the Institute of Economic Affairs, run by Arthur Seldon, Anthony Fisher, an enthusiast of Hayek's work ... On one occasion she put order in a meeting of party leaders to define the government program by banging a book on the table: these are the ideas that I want to put into practice. The book was *The Foundations of Liberty*, by Friedrick Hayek (Escalante Gonzalbo, 2015, p. 136).

As can be observed, freedom of thought and expression has formally triumphed in contemporary democratic societies. This was Spinoza's great aspiration in the seventeenth century, but the issue has become far more complex due to the massive accumulation of information disseminated among citizens via mass media and social networks. Although this freedom constitutes a foundational element of democracy, the central problem has shifted to the question of the *veracity* of the information received. It is understood that anyone can now voice their ideas on social networks. However, mass media – newspapers and television networks with national and international reach – continue to exert considerable influence over public opinion. If one adheres to Arendt's thesis regarding how politicians routinely manipulate truth and lies in order to legitimize themselves before the public, one encounters the significant fact that these media outlets and communication networks receive vast sums of funding to promote truths, post-truths, fake news, or simple nonsense – *paparrucha*. What circulates on social media, for instance, does not necessarily originate from individual citizens freely expressing their views. Rather, many posts are generated by anonymous sources impersonating individuals across multiple

fabricated accounts managed by paid teams. In the realm of newspapers and television, the work of *chayoteros* – journalists who are economically compensated to propagate certain convenient narratives among the population[145] – continues unabated. These individuals receive significant payments in exchange for broadcasting ideas to the broader public.

Moreover, economic and political elites are supported by think tanks that elaborate sophisticated theories aimed at sanctifying neoliberalism, the free market, and particular political narratives. These theories often attempt to portray, for example, the State of Israel as merely acting in self-defense – even when it is effectively carrying out acts that verge on genocide against Palestinians. Similar media campaigns are designed to depict the governments of Hugo Chávez or Nicolás Maduro in Venezuela as dictators or messianic evildoers, akin to how the Cuban regime is portrayed.

The role of think tanks in promoting dominant ideologies was clearly demonstrated in the late twentieth century with the spread of the so-called Washington Consensus.[146] Numerous academic, political and economic circles disseminated the theories of F. Hayek and Milton Friedman, imposing them across various countries as the only valid framework for economic development – advocating privatization of companies, indiscriminate trade liberalization, and drastic cuts to social programs.

Once again, the fundamental question arises decades later: Where does the truth of these theories lie? Today, such views are increasingly challenged by influential thinkers such as Joseph Stiglitz, Immanuel

145 *Chayote* is a vegetable (from the Nahuatl *chayutli*) and has no relation to the term's current political usage in Mexico. Politically, *chayote* refers to a bribe given by a government office to journalists or media outlets to ensure favorable coverage. According to the *Dictionary of Mexican Spanish*, it is defined as "a bribe that a government office gives to a journalist or media outlet to induce them to report according to their convenience" (https://dem.colmex.mx/Ver/chayote). The term began circulating in the 1960s, possibly earlier, when journalists visited *Los Pinos* to receive financial incentives in areas surrounded by *chayote* plants. The "Chayote Law" during President Díaz Ordaz's term was a failed attempt to regulate government advertising expenditures. A *chayotero* journalist is one accustomed to receiving these incentives.

146 This program was promoted by the US through the IMF, World Bank, and WTO to push for indiscriminate trade liberalization as the only viable path to economic development. Recommended policies included cutting social programs, reorganizing public expenditure to promote private investment, boosting exports, deregulating markets, and reducing state-owned enterprises. The term *Washington Consensus* was coined by John Williamson in 1989 at the International Institute for Economics. It marked the beginning of the neoliberal policy agenda's formal implementation.

Wallerstein, Boaventura de Sousa Santos, Atilio Boron, Noam Chomsky, and Pablo González Casanova. Citizens may possess the 'formal' right to express and disseminate their ideas within a democratic framework, but their ability to do so remains profoundly unequal in modern societies.

Science, power and democracy

In world history, it is necessary to highlight the transformation of truths once considered absolute. One clear case is the scientific conception of the universe centered on the Earth, as advanced by Ptolemy in the 1st century AD. This geocentric view remained unchallenged for over fifteen centuries until the arrival of Copernicus and Galileo in modern times, which brought about a heliocentric model. What was a solid truth from the 1st to the 17th century AD was ultimately proven false – or, from today's perspective, became a case of post-truth.

According to the Oxford Dictionary, this concept refers to "something related to circumstances where objective facts have less influence on public opinion than those called to personal opinion or belief".[147] In the contemporary world, what happens in the real world tends to matter less than what people imagine to be true. This also relates to the sphere of political democracy. Authors such as Crouch (2004) and Monedero (2012) argue that we may be living in a post-democratic era, one in which the media and social networks amplify the interpretations of dominant groups to such an extent that citizens end up accepting these views, even if they are detrimental to their own interests – or they simply refrain from participating in elections.

The post-truth phenomenon has been linked to political events such as the vote for the United Kingdom to leave the European Union, or the election of Donald Trump in the United States. These outcomes were not purely expressions of popular will, but rather the result of intensive political marketing by elite political and economic groups.

147 The *Oxford Dictionary* chose *post-truth* as the word of the year in 2016: "The concept of post-truth has been in existence for the past decade, but Oxford Dictionaries has seen a spike in frequency this year in the context of the EU referendum in the United Kingdom and the presidential election in the United States. It has also become associated with a particular noun, in the phrase *post-truth politics*. Post-truth has gone from being a peripheral term to being a mainstay in political commentary, now often being used by major publications without the need for clarification or definition in their headlines" (*Word of the Year 2016*, n.d.).

Media manipulation plays a key role in the dissemination of ideas, often imposing them even when they are known to be false. One illustrative example is that of Colin Powell, Secretary of State under George W. Bush (2001–2009), who publicly promoted the lie that Iraq possessed weapons of mass destruction.[148] This falsehood served to justify a military intervention that left over 150,000 Iraqis dead. The concern here is with the spaces where such ideas – often cloaked in scientific authority – are produced.

It is necessary to call attention to a controversial and complex issue: the relationship between science and power. In today's world, science can be selectively used to support particular conclusions based on carefully curated data. As one entry puts it: "In this era of post-truth politics, it is easy to cherry-pick data and come to whatever conclusion you want" (Oxford Advanced Learner's Dictionary, n.d.). Thus, one can find scientists who warn urgently of global warming, and others who claim it is merely a recurring natural phenomenon. There are those who condemn genetically modified organisms (GMOs) as a threat to ecosystems and human health, while others promote them as a solution to global hunger.

There is no doubt about the innovative potential of interdisciplinary research – as seen in institutions like the RAND Corporation in Santa Monica or the Santa Fe Institute in New Mexico. However, their close ties to powerful funders, including the U.S. government and private corporations, invite reflection about their connection to political and interest groups that have decided to offer to the entire world specific orientations disguised in academic terms and independently of their veracity.

This is not to suggest that all think tank researchers operate under the same ideological assumptions. Some scientists later regret how their work has been used. Alfred Nobel, for instance, developed dynamite in 1866 for construction purposes, but later lamented that his invention had been co-opted for destructive military uses. Robert Oppenheimer, a key figure in the development of the atomic bomb, was similarly troubled by the devastation it caused in Hiroshima and Nagasaki in 1945. Arthur Galston, who created a chemical compound to accelerate plant growth, was dismayed when the U.S. military repurposed it as Agent Orange to destroy vegetation and

148 On 5 February 2003, US Secretary of State Colin Powell addressed the UN Security Council, claiming Iraq possessed weapons of mass destruction – an assertion used to justify the US invasion of Iraq under Saddam Hussein. This presentation involved falsified images and was later proven entirely false, exposing the Bush administration's manipulation.

human life during the Vietnam War.[149] Even Einstein expressed remorse in his final years: "Perhaps you can forgive me"; this was a reference to the letter he co-signed in 1939 urging President Franklin D. Roosevelt to pursue development of the atomic bomb. Science, while often regarded as neutral, can become entangled in the objectives of dominant power groups.

Across various national contexts, there have also been intellectual circles genuinely dedicated to knowledge production, only to end up advancing particular ideologies as if they were universally valid – as in the case of neoliberalism. These may be recognized think tanks or smaller interdisciplinary initiatives. But in many cases, the goal has been to give ideological agendas an academic appearance and disseminate them across government institutions and civil society. Chile provides a notable example; before General Pinochet's 1973 coup d'état, a group of Chilean economists had already begun working within the University of Chicago's Economics Department to consolidate a project of an economic model for future generations:

> in 1956, an agreement was signed between Catholic University of Chile and the Department of Economics at the University of Chicago, to promote students exchange. The Ford Foundation granted a financing of 750,000 dollars for this, for 10 years. In following decades, more than 150 Chilean students were trained in Chicago, including Patricio Ugarte, Julio Chaná, Álvaro Bardón, Carlos Massad, and Jorge Cauas (Escalante Gonzalbo, 2015, p. 128).

Alongside figures from the Mont Pèlerin Society, such as Hernán Büchi, Carlos Cáceres, Cristián Larroulet, and Sergio de Castro, these economists developed the core of the neoliberal agenda in the 1960s. Organizations like the Center for Social and Economic Studies, the *Club de los Lunes*, and the *Sociedad Naval* were instrumental in opposing state intervention and fiercely attacking the policies of President Salvador Allende. Following the 1973 coup, many members of this intellectual group assumed key government positions. It was only in 1975, however, that the most radical elements of the program gained influence; Milton Friedman famously proposed a "shock program" of liberalization:

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149 Arthur Galston reflected in this way: "I used to think that one could avoid involvement in antisocial consequences of science simply by not working on any project that might have malignant or destructive ends. I have learned that things are not that simple and that almost any scientific finding can be perverted or distorted under social pressures" (Paúl, F., 2021).

> The neoliberal program was only put into practice systematically from 1975 onwards, when the most radical of its supporters gained a position in the board. The shock program that Milton Friedman promoted as an immediate option is well known: cutting public spending, liberalizing trade and deregulating financial sector ... . Chile became an interesting laboratory for many economists. Friedman personally visited Pinochet in 1975, James Buchanan and Gordon Tullock were frequent guests, Hayek himself was there in 1981 ... . Those responsible proudly called themselves the *Chicago Boys*, and defined themselves as neoliberals. The 1981 Mont Pélerin Society meeting was held in Viña del Mar (Escalante Gonzalbo, 2015, p. 129).

For Latin America, the Chilean case served as a model. Many governments sought to emulate the policies, while distancing themselves from the association with dictatorship, instead framing neoliberalism as a scientifically grounded path compatible with democracy. In Mexico, the shift to a neoliberal development model in the 1980s was not simply a response to external pressures. As María Eugenia Romero Sotelo (2016) shows in *Los orígenes del neoliberalismo en México*, the ideological groundwork had been laid much earlier. Political figures, businessmen, and bankers such as Raúl and Alberto Bailleres, Aarón Sáenz Garza, and Carlos Novoa had already begun promoting neoliberal ideas through events such as the 1958 Mont Pèlerin Society meeting in Mexico City (September 23–26), which featured Ludwig von Mises, Friedrich Hayek, and a number of prominent economists, officials, and academics from foreign universities.

This line of thinking was supported by the Bankers Association, the Mexican Cultural Association, the Autonomous Technological Institute of Mexico (ITAM), and the Mexican Council of Businessmen. In particular, banking conventions became key spaces for disseminating these ideas and for challenging the economic policies of the post-revolutionary Mexican State. Since 1938, the Confederation of National Chambers of Commerce had created the Institute of Economic and Social Studies to oppose President Lázaro Cárdenas's project; in 1953, this institute changed its name to the Institute of Social and Economic Research and aligned itself with the thinking of Mises, Hayek, and Milton Friedman. In 1946, ITAM was founded by the Mexican Association of Culture with funding from bankers, industrialists, and merchants. Notably, graduates include figures such as Emilio Lozoya Austin, Luis Videgaray, José Antonio Meade, Ernesto Cordero, and Agustín Carstens.

Even after President José López Portillo expropriated the banking system near the end of his term, the Ludwig von Mises Institute was established – precisely at the moment when the Mexican government began to alter its economic model under President Miguel de la Madrid in 1982. Neoliberal ideas, along with their program-design centers, began to be implemented using the power of the State.

> In the eighties, compact teams of public officials were formed in Mexico, which transformed not only the paradigm development, but also the social practices of political elites. These teams materialized, through the interaction among their members, a social space within which a new political discourse was generated with an eminently neoliberal content (Salas-Porras, 2014, p. 282).

The researcher Alejandra Salas Porras has examined the trajectory of 22 officials who were key to Mexico's neoliberal project from the administration of Miguel de la Madrid to that of Enrique Peña Nieto. Of these 22, 16 came from private institutions and only 8 from the National Autonomous University of Mexico (UNAM). Among the 16, 14 studied at ITAM – an institution sometimes described as offering "the most North Americanized economics program outside the United States" (Babb, quoted in Salas-Porras, 2014, p. 294). Another striking detail: 21 of the 22 pursued postgraduate degrees abroad, and 20 of them did so in the United States, all adhering to the ideological framework of the Washington Consensus. These officials collaborated with think tanks tied to the International Monetary Fund and the World Bank. As former president, Ernesto Zedillo has continued in global policy circles, chairing the Center for the Study of Globalization at Yale University.

Many of these intellectual centers have promoted scientific knowledge through interdisciplinary approaches and receive funding from giant private corporations and governments of industrialized countries. This raises the concern that science may easily lose its neutrality, sacrificing methodological rigor to advance predetermined ideological agendas. It is therefore vital to ask: is it possible to build a robust, interdisciplinary, and critical-thinking team capable of offering alternative paths for sustainable global development?

This last perspective – the idea that interdisciplinary teamwork can generate better knowledge and that ideas have real-world consequences

– is worth retaining. Yet one must always observe those who have wanted to control scientific knowledge by promoting politically motivated theories that serve only narrow interests. The difficulty in discerning truth lies not only in the overwhelming number of individual opinions found on social networks and in the press, but also in the sheer volume of research centers and institutes that cloak themselves in the prestige of science.

Thus, one must not only exercise caution when reflecting on our truths with rigorous reasoning, but also when expressing them – considering carefully when, where, and how they are disseminated. It is no coincidence that Spinoza, in letters to his friends, often used the Latin word *caute* (cautiously) – a personal motto in the Dutch intellectual milieu of the seventeenth century, signifying the need to be prudent in the face of dominant or conventional truths in any historical context. As Feyerabend (1992) aptly puts it, the dilemma of science is worth posing: "a political pressure group or an instrument of research?" (p. 103). It is not unreasonable to argue that certain groups with political power present themselves as discoverers and guardians of absolute truth – truths that, in fact, benefit only a select few. Presenting such claims with the appearance of objectivity and universal validity remains, then, a deeply political act that must be questioned and contested through a permanent critical effort to argue and reveal it.

The possibility of a deliberative democracy

Given the many possible definitions of democracy, it is essential to identify its fundamental traits. In both ancient Greece and its modern resurgence in the 17th century, one core element stands out: the freedom of citizens to express their ideas and influence public policy. For this reason, I highlight a concept that, though still debated and criticized, offers a useful framework for a much-needed proposal in our societies: deliberative democracy. This concept, introduced by Bessette (1980) and widely developed through the work of Habermas, provides a way to deepen citizen participation – something lacking in representative democracy, where legislators and elected officials often become separated from those who elected them.

A similar gap between the people and their leaders emerged even in Greek democracy, despite efforts to curtail the influence of professional politicians through measures such as ostracism. Still, one of Pericles'

most praised virtues in his funeral oration for the fallen at the start of the Peloponnesian War was the pride Athenians felt in living in a polis where citizens could debate all matters with freedom and *isonomia* (equality).

> We do not say that a man who takes no interest in politics is a man who minds his own business; we say that he has no business here at all. We Athenians, in our own persons, take our decisions on policy or submit them to proper discussions: for we do not think that here is an incompatibility between words and deeds; the worst thing is to rush into action before the consequences have been properly debated (Thucydides, 1916, Book II, p. 119).

Indeed, the *boulé* had been established precisely as an assembly for dialogue, discussion, and decision – a deliberative institution concerned with public affairs.

> In the Greek language, the word boúleusis –corresponding to deliberation in neo-Latin languages – is not, in principle, a notion with moral content. The term arose in public life and its original and proper application field is that of political practice. Thus, boúleusis refers directly to the institution of the Boulé, which in Homer designates the Elders Council or, in time of Athenian democracy, the Council of the Five Hundred, the body in charge of preparing through prior deliberation the several proposals that were to be presented to Assembly (Velasco Arroyo, 2009, p. 72).

In modern times, the first to use the concept of deliberative democracy was Joseph Bessette, in his 1980 text "Deliberative Democracy: The Majority Principle in Republican Government." He referred to a key feature in the philosophy of the American Constitution's founding fathers: the prevailing of majority rule, albeit with limitations designed to restrain the excesses of popular majorities. Given the population size in the United States, direct democracy was deemed impractical. Instead, representative government was preferred, on the grounds that elected representatives could make better laws than ordinary citizens, who were often prone to spontaneous, ill-informed, or unreflective decisions. In practice, however, representative democracy frequently resulted in public policies that reflected the priorities of elites rather than those of the citizenry.

This raises a key issue: how can legislators maintain a connection to the will of the people and avoid becoming an aristocratic elite that governs

in their own interest? How can popular majority sentiment be preserved among legislators, while also restraining the volatile impulses of the broader population? Institutional mechanisms that foster deliberation at the community level are needed. The objective is to prevent the system from becoming elitist or aristocratic – a structure where citizens merely elect their leaders at intervals, and those leaders then act independently of the people's will.[150] As Bessette noted, "it would be a mistake to prioritize representatives' independence over the majority sentiment in a system that they themselves chose" (Bessette, 1980, 114).

The way to counter this tendency is by encouraging representatives and leaders to promote public deliberation on policy matters that affect the majority. Bessette further developed this idea in his 1997 book The Mild Voice of Reason: Deliberative Democracy and American National Government. There, he argued that the system designed by the founding fathers remained democratic and deliberative – though he acknowledged the presence of forces that both promote and obstruct collective reasoning on shared goals. Drawing on his experience in the U.S. Congress, Bessette observed how many legislators, while formally representing the majority, acted in pursuit of personal interests and ambitions. His aim was to see legislators engage in genuine deliberation on the nation's most pressing concerns. In fact, it is a permanent problem in every representative democracy: "People have been able to periodically elect their representatives, but these are who then make decisions".[151]

While Bessette introduced the term, the proposal has since generated wide discussion among thinkers such as Habermas, John Elster, Rawls, José Luis Martí, and others. Among these, it is likely Habermas (1999) – of the second generation of the Frankfurt School – who has done the most to disseminate and elaborate on the idea, especially through his work Theory of Communicative Action:

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150 Bessette identifies several systemic flaws in American democracy: "Corporate power dominates formal democracy because either (1) the crucial decisions are made outside the political system, that is, in the boardrooms; (2) the wealthy interests have 'captured' the institutions of government; or (3) these same interests have manipulated public opinion" (Bessette, 1980, p. 114). Deliberative democracy is proposed as the corrective model.

151 In an interview with Albert Lladó on 17 April 2012, José Luis Martí – expert in deliberative democracy and professor at Universitat Pompeu Fabra – asserted: "The demand for a new democracy is unstoppable" (Lladó, 2012). He argued that a deliberative model is viable, as mechanisms for a more ambitious democracy already exist.

> From 1968, Habermas became the most important German thinker of the so-called deliberative democracy, which is the formation of political wills through free, open and permanent discussion between all participants in political dialogue on equal terms (Rivera, 2017, p. 92).

Influenced by Adorno, Lukács and Weber, Habermas criticized the situation in postwar West Germany in his book *The Structural Transformation of the Public Sphere*. There, he argued that the opinion of the majority was controlled and manipulated by mass media companies focused on promoting private economic interests. These companies wanted to defend a private-interest rationality, but they also wanted to extend them for appropriation by public opinion.

> Habermas's criticism of German society of his time: greater access to culture, higher education and cultural goods, but less possibility of democratically influencing long-term public policies (Rivera, 2017, p. 91).

This brings us back to a persistent dilemma: how can people – often lacking education and time beyond daily survival – be expected to engage in thoughtful reflection on the major issues that governments must address? While it may seem utopian, deliberative democracy should still aim to institutionalize citizens' participation in public policy reflection, discussion, and formulation.

Many discussion forums on national and local issues have been promoted. These are valuable in making the citizen's voice heard in relation to government policies. However, it is important to distinguish between two different scenarios: first, when politicians hear the citizen voice but act regardless of it; second, when the community consensus meaningfully shapes the formulation, implementation, and evaluation of public policy. The second case represents more than just listening – it embodies a form of 'governance', in line with Luis F. Aguilar's (2010) vision of governance as a shared endeavor.[152] Here, organized civil groups act as co-participants and active agents. This is the type of deliberation envisaged by the deliberative democracy model.

152 The term 'governance' remains controversial. It has often been used in neoliberal discourse to justify the downsizing of the state. However, in Luis F. Aguilar's (2010) conception – which I follow here – governance aims to strengthen civil society's organized participation in public decision-making.

The Hobbesian model, with its postulate *auctoritas non veritas facit legem*, must be rejected – although many political leaders continue to embrace it, believing their authority entitles them to define a "truth" that becomes law. This is a hallmark of fascist and totalitarian regimes, such as those described in Orwell's 1984, where even a Ministry of Truth is created to control thought and suppress dissent.[153] In contrast, the German philosopher's alternative becomes relevant: "On the contrary, Habermas proposes this principle: *veritas non auctoritas facit legem*" (Rivera, 2017, p. 94). Still, the fundamental problem remains: in many cases, the location of truth is uncertain. This uncertainty underscores the importance of collective deliberation as a means of arriving at a consensual and reasoned truth.

Spinoza stated in the *Tractatus Theologico-Politicus* (TTP) that it is almost impossible for a majority to agree on something absurd. Yet, considering the numerous elected governments that have enacted significant public policy failures, this claim may be better interpreted as suggesting that it is less likely for a majority to be mistaken than for a single authority to err. Hence, a proposal debated by many tends to be more credible than an authoritarian decision. This raises a major question rooted in the rationalist era: how can reason be applied to the analysis of social problems and the formulation of public policies? A starting point must be a radical critique of authoritarian models that persist in Europe, the United States, Latin America, and elsewhere:

> Habermas' originality lies in the fact that he criticized the dominant sociological tendencies of his time because they attributed a big potential for historical progress to the radical industry rationalization, leaving aside all questions relating to workers and employees participation (Rivera, 2017, p. 96).

Indeed, multiple rationalities may coexist. One is the logic of capitalism, in which profit maximization overrides all else, placing technological progress in the service of large-scale industry. Another is the rationality rooted in the broader population's demand for redistribution of social wealth. One is the logic of extractive industries that plunder the subsoil in search of valuable

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153 Orwell wrote *1984* intending to reflect a dystopian future envisioned in 1948, where everything was controlled by "Big Brother" through television and a government agency known as the Ministry of Truth, assisted by its thought police. This is, in fact, the title adopted by Dorian Lynskey in his book *Ministry of Truth: A Biography of George Orwell's 1984*. Similarly, Runciman, in *How Democracy Ends* (2019), highlights how efforts to suppress freedom of thought and expression ultimately undermine democratic aspirations.

minerals for the global market; another is the logic of environmental conservation, recognizing the planet's degradation as an existential threat to humanity. The former logic enjoys greater media power and seeks to impose its perspective:

> The neoconservatives want to stick to the capitalist model of economic and social modernization at all costs. They continue to give priority to economic growth, protected by the commitment of the welfare state, although it is also more strangled every day that passes (Habermas, 1999, p. 12).

These divergent rationalities continuously clash in governmental public policy debates. When the logic of conservation is excluded, national policies often reflect the reasoning of big business. Or, following Machiavelli's analysis in The Prince, politics – though often assumed to follow the logic of a majority – is frequently shaped by reason used for individual or group interests to discredit or destroy enemies:

> A political interest is something elementary that cannot be negotiated according to a rational deliberation. Political decisions are made in an agonal context, that is, in a competitive game between friends and enemies where the aim is not to understand the other, but to defeat him... the politics core, which is a competition for material interests (Rivera, 2017, p. 99).

If this is accepted, deliberation focused on reflection and the common good becomes a chimera – a utopia. However, rather than resigning to Hobbes's vision of the war of all against all, it is possible to adopt Spinoza's view: human beings, while ruled by emotions and passions, also possess within those passions the impulse to preserve society and avoid destructive conflict. Thus, the fight for ecological sustainability, for instance, may ultimately align with capitalist interests – a devastated planet would yield no resources for profitable exploitation.

Spinoza's proposal, within the framework of free speech, urges citizens to use reason directed at collective interests during deliberations on social problems. When sedition or collapse threatens, the state must intervene to prevent crime and disaster. This reflects a rational choice of an option "that builds the lesser evil compared to the open fight of all against all" (Rivera, 2017, p. 101). The comparison is apt – anarchy and confrontation damage all parties – but the issue should not be framed merely as a "lesser evil."

Rather, it must be seen as a preference for a more ambitious democratic model than the status quo. While the political reality of competing interests must be acknowledged, it is also necessary to envision a scenario where shared interests generate widespread benefits. This is the basis for describing deliberative democracy as a viable and desirable model within contemporary democracies.

> Deliberative democracy is a normative political model whose basic proposal is that political decisions are taken through a procedure of democratic deliberation. Therefore, it consists especially, in a decision-making model. The model is normative because it does not aspire to describe how reality is like, how political decisions are actually made in our advanced democracies, but rather to show how reality should be made (Martí, 2006, p. 22).

This distinction – between reality as it is and as it ought to be – marks the difference between realism and idealism. Yet, within idealism, a further distinction must be made between unattainable utopias – *e.g.*, communism or a classless society – and realistic projects achievable in the near term. A country entirely free from corruption may be unrealistic, but more effective mechanisms can certainly be created to detect and combat it. Similarly, although not the entire population may be prepared or willing to deliberate on social issues, those who are can be empowered with better information and legal tools for participation.

This perspective aligns with Habermas's (1999) idea of emancipatory knowledge aimed at achieving consensual truth (Habermas, 1985).[154] Such knowledge enables human action to overcome the subjectivism and individualism often embedded in the defense of self-interest. Absolute truths may not exist, but consensual truths do – and these must lead to common-good projects.

> The speaker must have the intention of communicating a true propositional content, so that the listener can share his knowledge; the speaker must want to externalize his own intentions in a true way, so that the listener can believe

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154 The concept of consensual truth is notably developed in Habermas's theory, as presented by Belardinelli in his article *"The consensual truth theory of Jürgen Habermas"*, published in *Anuario Filosófico*. In this account, truth is not framed as an absolute or objective reality, but rather as a product of "a reciprocal agreement on the basis of norms and values considered valid" (Belardinelli, 1991, p. 116).

> (have confidence) in what he says; the speaker must finally seek the right expression in consideration of current norms and values, so that the listener can accept it in such way that both, the speaker and the listener, can come to an agreement on a recognized normative basis... The purpose of a communication is the provocation of being in an agreement that ends in the intersubjective communion of reciprocal understanding, of shared knowledge and of reciprocal trust (Habermas, quoted in Belardinelli, 1991, p. 116).

Habermas also elaborates on this in *Was heisst Universalpragmatik*, where he proposes that consensus can meet conditions of universal validity in specific communities. These include core democratic values such as comprehensibility (*Verständlichkeit*), truth (*Wahrheit*), sincerity (*Wahrhaftigkeit*), and normative rightness (*Richtigkeit*). In the TTP, Spinoza condemned the Jewish authorities' misuse of divine authority in scripture to impose absolute truths. He advocated instead for freedom of thought and expression within a democratic model grounded in the republican experience of 17th-century Holland – yet he never claimed that a single rationality could be absolute.

It remains essential to insist on the rationality of opinions and practical actions embedded in state policy that can become hegemonic among particular groups. Though some may liken this to the Sisyphean task of lifting a stone that perpetually slides back down, meaning can still be found in the very act of trying, as Camus (1942) suggested in The Myth of Sisyphus:

> I leave Sisyphus at the bottom of the mountain. There he always finds his burden, but Sisyphus teaches a higher fidelity that denies gods and lifts stones. He accepts that everything is fine. He does not judge a universe without a master as something sterile or futile. Each grain of stone, each mineral fragment of this dark mountain, forms a world by itself. The effort to reach peaks is enough to fill a man's heart. One must imagine Sisyphus as someone happy (Camus, 1942, p. 112).

Wittgenstein also noted the challenge of establishing a basis for our certainties and beliefs: "the difficulty lies in seeing the lack of foundation in our beliefs" (Wittgenstein, 2013, p. 24). Still, the effort remains worthwhile – it is the basis for building a better society and world, both for current and future generations, in resistance to nonsense, *paparrucha*, or post-truth. Spinoza's 17th-century maxim, *Nil volentibus arduum*, continues to

resonate.[155] While the difficult or impossible may seem like a titanic task, it is one that must be taken up by both small groups and broad segments of society.

155 The maxim *À cœur vaillant, rien d'impossible* ("To a valiant heart, nothing is impossible") circulated widely in 17th-century Europe and became associated with the founding of the artistic society *Nil volentibus arduum*, created in Amsterdam in 1669. Spinoza was familiar with the saying and applied it philosophically prior to the publication of the *Theologico-Political Treatise*, as a statement of intellectual courage in the face of adversity. The phrase has also been used by political leaders to assert the validity of their projects, and it continues to resonate in democratic contexts, particularly in relation to reasoned discourse and public deliberation.

Conclusions

By examining the development of a democratic model and its practices in ancient Greece, considering a brief overview of the 16th and 17th centuries, and incorporating the final chapter on the significant epistemological challenges in the pursuit of truth, this study had outlined the birth of democracy and the resurgence of a political tradition that had largely been forgotten following the destruction of Greek democratic practices by the Macedonians after Alexander's death. Although Rome – during the period from the end of the 6th century to the end of the 1st century BC – adopted a republican model in political practice, in which power was concentrated in the Senate as a representative body of multiple tribes, none of the major thinkers for more than eighteen centuries proposed again the aspiration for a democratic model. The Republic – like democracy – began to be forgotten after Cicero's death, when Rome became an Empire (from the end of the 1st century BC until the fall of the Western Roman Empire in the 5th century AD), and those concepts were completely buried during the feudal period (6th to 16th century AD). Monarchy came to be recognized as the only legitimate form of government – even wrapped in a divine halo and supported explicitly by the Church.

Political theory declined notably – even disappeared – for fifteen centuries, giving way almost entirely to theology once Christianity became the official religion of rulers. Any worldview diverging from the truths assumed to be revealed in the Scriptures was fiercely repressed – even to the point of death – through the Inquisition, an institution specifically created to suppress ideas. The 16th century marked a decisive turning point. In political theory, Machiavelli's The Prince introduced a radical shift in social analysis, by portraying political power as autonomous and detached from divine sanction; social actors were seen as relying solely on their own capacity to plan and execute their actions, gathering all necessary means to preserve or expand their power.

In science, the Copernican conception of heliocentrism was truly revolutionary – as reflected in the title of his work De revolutionibus orbium coelestium – because men not only employed empirical observation but also relied on reason to understand natural processes and to advance theories that stood in contrast to traditional postulates.

In this context – intensified by the Protestant Reformation – I highlighted the climate of intolerance characterizing the 16th century, as well as the response in the form of the Counter-Reformation, followed by the rise of rationalism in the 17th century. I also pointed to the tragic case of intolerance against Uriel da Costa within the Jewish tradition, before referring to the fanaticism that surrounded the false messiah Shabtai Tzvi. The purpose of these examples was to show how reason culminated in Spinoza's political theory – in intrinsic relation to theology – which, amid the total domination of absolutist regimes, put forward democracy – characterized by freedom of expression – as the best form of government according to reason.

The proposal of a new political model in the 17th century is striking, given that the absolutist monarchic system still dominated across Europe, though political contestation was already openly expressed. By the time of Spinoza's youth, King Charles I of England had already been executed in 1649 – yet absolutism returned when his son, Charles II, took power again after Cromwell's death. Spinoza did not live to witness the Glorious Revolution of 1688 and the emergence of an English parliamentary model, as he died in Holland in 1677. In this sense, his proposal in the TTP was first a theoretical defense of Jan de Witt's republican (*res publica*) model in Holland, and then an anticipatory vision of democracy – a vision that would only begin to materialize across Europe centuries later. Spinoza defined freedom of thought and expression as its essential trait.

However, rather than focusing exclusively on contemporary political theory, the final chapter turns to the issue of truth and post-truth – including the term *paparrucha* or 'nonsense'. While freedom of expression must be firmly defended, it is also necessary to sharpen the distinction between truth and post-truth, between serious reflection and charlatanry, between the offer of sustainable data and so-called fake news, between critical thinking and absurdity.

This may well represent the most pressing challenge for today's democracies. In what Manuel Castells (2000) describes as an information

society, individuals are inundated with data, often at the expense of reflection, analysis, and deliberation. What is required is not the unfiltered flow of opinion, but critical and well-supported argument based on data and reason. Such analysis occasionally emerges from think tanks, though these institutions, despite their theoretical sophistication, often seek to promote a singular ideological framework.

There are no straightforward methods for discerning truth amid the cacophony of voices present in the media and on social networks. Tools for separating substance from triviality, or truth from manipulation, remain elusive. In societies committed to freedom of expression – whether in the press, on social platforms, or in private discourse – democratic norms demand both tolerance for opposing viewpoints and the clear articulation of convictions intended to advance the common good.

I have sought to illuminate both the achievements and limitations of ancient Greek democracy and its modern resurgence since the 17th century, offering reflections relevant to the present. Democratic systems are preferable to historical experiences of tyranny, dictatorship, and oligarchy. Nevertheless, enduring uncertainties persist concerning the very meaning of democracy – a term invented by the Greeks to empower the most disadvantaged, yet in practice excluding more than half the population.

The discussion has focused on the historical and philosophical significance of both ancient democracy and its modern revival. Many important contributions lie beyond the scope of this analysis, but beyond the central role of Habermas, two figures merit brief mention. One is Joseph A. Schumpeter (1883–1950), particularly for his two-volume work *Capitalism, Socialism and Democracy* (Schumpeter, 1996, 2010), which exerted considerable influence on 20th-century political theory. Positioned within the realist tradition, Schumpeter combined conservative premises with a defense of liberal democracy based on electoral mechanisms. He conceived of democracy not as an ideal system but as a procedural method for managing conflict among economic and political elites – a system in which elections confer provisional authority, always subject to reversal.

Schumpeter observed how parliamentary models were reshaped by mass movements demanding greater rights and social improvements. In the face of totalitarian threats – such as Carl Schmitt's model in support of Nazism – political stability depended, in his view, on elites accepting the rules of electoral competition. In this liberal vision, "the people" play

a minimal role – participating only during elections and otherwise acting passively, guided more by campaign impulses than reason.

His vision of democracy is reduced to the electoral process – in which various competing elites accept the outcome of votes, but always attempt to influence them. He openly criticized concepts such as the common good, general interest, social contract, or popular will, as illusions – because, he argued, the so-called "people" would never reach high levels of rationality, but would always be driven by impulses and momentary instincts, easily manipulated: "There is no univocally determined common good with respect to which everyone is in agreement or can be reached through rational argumentation" (Schumpeter, 2010, p. 39). Governments must respond – at least minimally – to social demands, but they are always shaped by economic and political groups.

Schumpeter's realist conception of democracy centers on the general acceptance of electoral processes and their outcomes: "Democracy seems to imply a recognized method by which to conduct the competitive struggle, and that the electoral method is practically the only one available for communities of any size" (Schumpeter, 1942, p. 271). Though he opposed dictatorships, he accepted a system in which dominant groups alternate in power, while the citizenry remains structurally weak: "Schumpeter insists that the elites not only have, but construct strategies and rhetoric capable of manipulating the citizens' decision-making when voting, who seem to do so with viscera rather than their brains" (Vidal de la Rosa, 2010, p. 188).

As for freedom of expression, Schumpeter did not elaborate extensively – though he acknowledged that there must be "a considerable amount of freedom of discussion *for all*. It will normally mean a considerable amount of freedom of the press" – while also warning that "this relation between democracy and freedom is not absolutely stringent and can be tampered with" (Schumpeter, 1942, p. 272), due to the people's low rationality. A contemporary conception of democracy thus emerges that differs markedly from that of ancient Greece, having been reduced primarily to electoral procedures in which citizens exercise limited influence over those who govern.

I now emphasize more strongly the vision of Alan Touraine, whom I met on several occasions both in Mexico and in France through the coordination I held for several years of the Alan Touraine Chair at Instituto Tecnológico y de Estudios Superiores de Occidente (ITESO – Technological Institute and Higher Studies of the West, in Guadalajara, Mexico) and the Universidad

Iberoamericana (Ibero-American University) in Puebla, Mexico, bearing his name and symbol. He carried out important and valuable academic work for several decades and passed away in 2023. Here I refer – among many contributions on unionism, social movements, the subject in society, and women – specifically to a remarkable work entitled *What is Democracy?* (Touraine, 2001). For him, the concept should not refer solely to the election of rulers – it encompasses many levels, such as the subject's freedom, the fairer distribution of economic resources, political pluralism (already discussed with Robert Dahl's concept of polyarchy), greater citizen participation, and the opening of public space.

Touraine (2001) postulates that democracy had already begun to degrade in the twentieth century:

> Democracy, thus weakened, can be destroyed, either from above, by an authoritarian power, or from below, by chaos, violence and civil war, or from within itself, by the control exercised over power by oligarchies or parties that accumulate economic or political resources to impose their decisions on citizens reduced to the role of voters (Touraine, 2001, p. 16).

The 'supposedly sovereign' people have been vanishing within the power of oligarchies, consumerism, and the global market, as their voices are no longer heard in the spaces where public policies are decided. This author, quite rightly, draws on one of Spinoza's key postulates: "Freedom of opinion, assembly and organization is essential to democracy" (Touraine, 2001, p. 18). For this reason, the same foundational principle has been stressed when discussing deliberative democracy.

At the same time, there is a structural problem in representative democracy as it is known today, because elected officials are increasingly distant from the citizens who chose them. It seems that base and top now belong to entirely different worlds – or, as Wolin (2003) notes about the United States, the elected representatives no longer have anything to do with the voters who elected them:

> In the current models of representative democracy there is a distancing of citizens from traditional political action, that is, from political parties. Politics is limited to solving technical problems and democracy is understood as a process by which rulers are elected, who will be legitimate if they achieve a high degree of growth and well-being for society (Sánchez, 2019, p. 140).

Individuals must exercise their freedom and make their voices heard in the highest circles of power. Democracy must not be defined solely by the existence of electoral processes – one must recall, for instance, that even the Greeks chose their leaders by lot.

Although democracy may be defined in various ways, what seems most essential today is continued citizen participation – not just in electing rulers, but especially in the formulation, implementation, and evaluation of public policies. This is precisely what Luis F. Aguilar (2010) refers to when discussing the need for governance as a new form of governing, highlighting key characteristics such as the rule of law, the fight against corruption, transparency, accountability – and above all, doing this in conjunction with organized groups from civil society (Aguilar, 2010, p. 32).

This model of co-governing departs markedly from authoritarianism. It involves more than electoral processes – it requires, as a precondition, overcoming both the lack of rational and political analysis among large parts of the population, and the absence of national interest among economic and political elites. In ancient Greece, it was either the ignorance of the citizenry or manipulation by professional politicians that led to disastrous decisions by the masses. A similar difficulty exists today, as broad sectors of the population remain apathetic toward the common good or disengaged from participatory mechanisms. Mere abstentionism – which disregards centuries of struggle for universal suffrage – continues to represent a serious issue when electing leaders.

Moreover, ideological debate must remain central – as a vehicle for the expression and confrontation of ideas. When consensus cannot be reached – especially regarding public policies or decisions to be taken – a vote must be held to resolve the matter by majority. Unfortunately, in today's democracies, it remains common to influence voting behavior – particularly through mass media and social networks –, and even to purchase votes through clientelist policies or direct material incentives.

The deterioration of the democratic model is in large part due to groups who remain indifferent to public policy, and who do not engage in the processes of deliberation, execution, and evaluation of government programs. Since ancient Greece, some individuals have been swayed by individualist passions and emotion when making decisions. In civic life, reason alone does not prevail – emotions and feelings, which may or may not be just, also shape understanding.

Feelings and emotions are not inherently negative. In the seventeenth century, Pascal already criticized Descartes for over-relying on reason and ignoring the insights of the heart.[156] He famously insisted on the need for both: "We know the truth not only by reason but also by the heart" (Pascal, 2010, p. 24). Yet strong emotions in the moment can also produce bad decisions.

Spinoza likewise recognized the need for both emotion and reason – although he prioritized the latter. Emotions can lead in various directions – they may give rise to either sadness or joy, irrational impulses or passions oriented toward the common good. The former must be avoided, particularly when they produce social harm, whether triggered by the violent passions of an individual or a crowd. Kaminsky (1990) has already explored this complex emotional world in Spinoza's philosophy in Spinoza: *The Politics of Passions*, based especially on the *Ethics*, where he describes "a philosophy of human life kneaded by desires and unfolded by passions" (Kaminsky, 1990, p. 25) – one where the common good must be clearly preferred.

Sartre (1959), too, in *Outline of a Theory of Emotions*, underlined in the 20th century the importance of emotion and the creative force of imagination. Still, in politics – as in life more broadly – acting solely on emotion may be dangerous. This is why Spinoza emphasized the role of the State's intervention when the impulses and actions of men threatened the common good. In all cases, reason retained its decisive role.

Recall, for instance, how in Greece the crowd stoned Lycides to death after he expressed a dissenting view that went against public feeling in the face of the final Persian stronghold under Mardonius. The practice of ostracism also sought to remove those who did not align with majority sentiment.

Not only electoral processes, but also citizens' assemblies, can become spaces of conflict shaped by emotion and divergent opinion. Such is the nature of civil society – a mosaic of contradictory interests where unity is difficult to achieve. In these spaces, certain leaders often capitalize on

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156 In chapter III of *Pensées*, Pascal famously writes: "The heart has its reasons that reason does not know" (*Le cœur a ses raisons que la raison ne connaît point*) (Pascal, 2010, p. 24). This criticism of Cartesian rationalism underscores the neglect of faith and emotion in Descartes's philosophy. In the 20th century, Antoine de Saint-Éxupéry, in *The Little Prince*, further emphasized the primacy of emotional insight: "Only with the heart can one see rightly. What is essential is invisible to the eye" (*On ne voit bien qu'avec le cœur. L'essentiel est invisible pour les yeux*) (Saint-Éxupéry, 1943, p. 83).

popular sentiment, swaying decisions to serve specific interests. Where educational and reflective levels are low among broad sectors of the people (*plebis*), one can frequently sense the influence of professional politicians manipulating votes.[157] This is the political realism assumed by Schumpeter – though he treated it as a permanent feature.

The solution lies in the long term, when the civic education that Plato advocated in antiquity, and that Rousseau later revived, can finally become a true priority in state projects. In the meantime, within a democratic model, every citizen has the duty to raise their voice, and the state has the obligation to invest in education and to monitor and punish any actions that harm the common good.

It is important to acknowledge the limitations of individual understanding – no single person can access the entirety of truth. Approaching truth requires the convergence of diverse perspectives within groups that operate as genuine laboratories of thought.

Ideological struggle is a constant in any society, making dialogue and the confrontation of ideas indispensable. Yet, the historical development of knowledge production has also fostered the emergence of so-called think tanks – often financed by considerable economic resources from both governmental and private sectors – which have, in many cases, co-opted the pursuit of truth. These institutions have frequently advanced neoliberal perspectives that have dominated intellectual and policy frameworks for decades. A central question, therefore, is whether such efforts truly advance scientific knowledge or merely reinforce ideological projects designed to serve powerful economic interests. In this context, critical thinking becomes an urgent necessity – a capacity that can only thrive under the conditions of deliberative democracy.

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157 Although the concept of populism cannot be explored here in depth, it remains a highly contested topic in political science and is frequently used today – particularly by conservative sectors – to discredit left-wing governments. It is important to recall that the notion of *δῆμος* (the people) is foundational to the word democracy and that Cicero later developed its Latin equivalent, *populus*. Democracy, in essence, entails popular participation and the pursuit of public interests. In classical Greece and Rome, *the people* could denote all citizens or, more commonly, the lower classes. Today, the ambiguity persists, especially in debates over left- and right-wing populism. While concerns remain about the manipulation of citizens – particularly those with limited educational backgrounds – it must also be acknowledged that educated individuals are not immune to influence. Ultimately, any political project that seeks to govern must claim to represent the people and their interests; in this sense, all governments are necessarily populist to some degree.

The current debate reflects broader concerns about the claimed neutrality of science. In reality, science is often shaped by and serves specific interests. Power dynamics are embedded in all realms of knowledge production. Some researchers and journalists are willing to pursue almost any subject when funding is available. Globally, many major think tanks have received substantial financial backing to promote the ideological tenets of neoliberal capitalism – including policies that emphasize free trade, privatization, and reductions in public social spending.

Large Western media outlets also enter the scene, routinely broadcasting critiques of socialism and communism, denouncing the "evils" of progressive populist governments, lamenting the "decadence" of the Russian model, and highlighting the "authoritarianism" of the Chinese government – despite its considerable economic achievements. All of this is presented under the guise of scientific thinking, though in truth, what must be recognized is that science and power are deeply interrelated – and science does not always defend truth.

Within the great problems and conflicts of today's world, multiple interpretations are in constant dispute, and every citizen is left wondering where truth lies. This is why the concept of post-truth has gained such prominence in recent decades. Ideological debate now permeates the academic world and the public sphere across the planet – particularly in democratic societies, where people's ideas matter profoundly, as citizens express their political preferences through voting.

This debate extends into the mass media, which strongly influence public opinion, as well as into social media platforms, which have become enduring spaces of ideological confrontation. Everywhere, there is an attempt to impose a particular vision of truth, regardless of its relationship to facts. At times, our contemporary societies appear to be drifting toward a post-truth paradigm – one in which perception and belief outweigh empirical reality or an understanding of what is actually happening. Major media outlets and social networks increasingly play a decisive role in shaping public imagination, steering individuals toward specific political orientations.

In taking up the concept of democracy – which gives this text its title – it is essential to highlight that Enrique Krauze's thesis from the 1980s, *Democracia sin adjetivos* ("Democracy without adjectives"), was both simplistic and misleading. Krauze argued that nothing more should be

expected of democracy than the election of leaders – a view already posited by Schumpeter. Today, however, there is a well-grounded and ongoing debate about what the democratic model truly entails: not only clean elections, but also better public policy, a fairer distribution of wealth, control of crime and violence, an effective fight against corruption, and respect for freedom of expression. Touraine's question (2001) in *What is Democracy?* remains open – a debate that will undoubtedly be long and controversial.

In my own approach, I have sought to highlight both the lights and shadows of ancient Athenian democracy, as well as the resurgence of democratic reflection in the seventeenth century – when Spinoza reasserted the value of democracy in a climate of profound intolerance, placing freedom of thought and expression – both religious and political – at the center. From this perspective, my proposal draws on the idea of deliberative democracy, as articulated by Habermas, in which dialogue and discussion among citizens play a central role – even if, in practice, it is often limited to a minority of the population.

This discussion can be further enriched by Robert Dahl's theory of polyarchy (Dahl, 1956, 1971), which – rather than focusing on popular sovereignty or an ideal democracy – emphasizes the empirical reality of competing groups within society that share power. Several political organizations in Western democracies still exhibit high levels of competition. Even when one group holds a dominant position, the reality of polyarchy is evident in the right to participate in a range of public deliberations.

Democracy is defined not only by periodic elections, but also by freedom of expression and debate, by access to public office, and by the presence of autonomous organizations within civil society. This approach of multiple powers in a polyarchy[158] – which Dahl explicitly contrasts with oligarchy – strongly complements the concept of deliberative democracy.

Today, political discourse in many countries is almost entirely dominated by electoral debates – where political marketing overshadows substantive dialogue. The discussion no longer revolves around the quality of programs

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158 This is a defining trait of contemporary democratic societies: competing power groups, backed by segments of the population, are represented within government and continuously debate public policy. This process produces a balance that contributes to social stability. "As the system becomes more competitive or more representative, politicians seek the support of groups that are gaining access to political life, and respond in very diverse ways to the new opportunities for participation and public debate" (Dahl, 1971, p. 31).

or party platforms, but around discrediting opponents and manipulating voter sentiment. The aim is to impose a particular version of post-truth, regardless of objective realities or historical facts.

The text by Steven Forti (2021) is illuminating in this regard. He notes that in the twenty-first century, it is primarily the right and far-right who have weaponized post-truth discourse, often in combination with fake news – as seen in the 2016 campaigns in both the United Kingdom and the United States. These movements have sought to present themselves as legitimate participants in modern democracy, drawing on conservative academic currents and using social media to disseminate their ideology.

This search for truth, post-truth, and *paparucha* (nonsense) connects directly to the concerns already posed by Spinoza – namely, that not even scientific thought can offer an entirely objective or neutral foundation. Science has never been truly neutral – major scientific advancements have frequently been exploited by political and economic elites for their own gain. In all cases, freedom of thought – exercised within the framework of modern democracy – must be accompanied by reasoned argument before attempting to build consensus. It is vital to continue fostering rigorous academic reflection in team-based settings, but without subjugating such spaces to a single ideological line. Even when these institutions receive substantial funding from governments or private interests, they must still prioritize plurality and critical thought.

The tension between truth and post-truth will remain an ongoing debate. The task of identifying what is actually happening in society must remain the guiding principle of scientific inquiry – even when this contradicts narratives promoted by mass media, social platforms, or research centers aligned with elite interests. In a world oversaturated with information, the persistence of post-truth – a vision of reality detached from historical fact – can easily lead to confusion or even despair. One may cease to believe in anything and withdraw from public life altogether.

While philosophical schools such as Epicureanism – focused on the pursuit of personal pleasure – and Stoicism – centered on individual resilience – offer valuable personal insights, their downside lies in the risk of extreme individualism. When taken too far, they lead people to retreat into self-reflection, turning away from the pressing historical problems of the real world. These approaches are not in themselves harmful – they offer many benefits for personal development – but in moments of uncertainty

and disorientation regarding truth and post-truth, one cannot take refuge in solipsism.

Our commitment must be to social engagement and shared modes of thought aimed at analyzing the present – through teamwork and dialogue – in order to generate new knowledge and proposals that serve the majority. The long tradition of human society is marked by both achievements and failures. Therefore, analyzing our history helps us to contemplate and live better in the present, facing all tour projects aimed at building a better democracy.

Finally, emphasis has been placed on three fundamental virtues of Greek democracy – λόγος (reason or speech), παρρησία (frank speech), and φρόνησις (prudence or moderation). In parallel, Spinoza proposed three corresponding concepts – equally necessary for democratic life – namely *ratio*, *libertas*, and the imperative verb he frequently used in his correspondence: *caute*.

Rational thinking – expressed in the Latin *ratio* – recalls the spirit of seventeenth-century rationalism, a time when Spinoza challenged the truths of Catholic and Jewish dogmas extracted from Scripture and when, based on reason, he proposed the democracy model as the best form of government.

Spinoza recognized that body and spirit reside within the same individual. This does not entail a rejection of passions or emotions, but rather the need to channel those directed towards the common good and avoid those that promote sorrow, hatred, violence, revenge, or solipsism. Thinking, reflecting, creating knowledge, and developing critical thought are fundamental priorities for contemporary citizens. Nonetheless, individuals may be influenced by negative passions rooted in individualism or group interests, which can lead to social disorder.

The second concept is freedom – articulated in Greek as ἐλευθερία and in Latin as *libertas*. These notions carry various nuances – as emphasized by Benjamin Constant and Isaiah Berlin – but attention here is drawn to the ability to think without constraint and express ideas openly before authorities and society at large. This task remains difficult in a context of informational oversaturation. In the seventeenth century, under the influence of Counter-Reformation intolerance, as well as rigid elements within Protestant and Jewish traditions, the defense of free expression was essential to move beyond absolutism – though it carried considerable risks.

While many contemporary states operate under liberal democratic models, freedom of expression remains a core requirement. It is necessary to articulate ideas publicly – within government, the media, and social networks – through parrhesia. Ideological debate must be embraced, as public policy should be influenced by informed civic participation. At the same time, idealized notions of freedom must be approached cautiously. As Bauman noted, "freedom is never complete" (Toro, 2023), due to structural and circumstantial constraints.[159] This perspective aligns with his broader characterization of a "liquid society" marked by privatized modernity and enduring dynamics akin to Hobbes's *homo homini lupus*. Still, such limitations do not preclude the pursuit of happiness or commitment to the common good. Giddens's (2002) concept of 'ontological security' captures this balance between individual conviction and societal interaction.[160]

Both *libertas* and *ratio* are central to Spinoza's thought in Scoffield's (2023) Baruch Spinoza: *Unveiling the Philosopher of Freedom and Reason*. These principles underpin the democratic model he envisioned in the seventeenth century.

A final concept that warrants emphasis is the imperative verb Spinoza consistently used at the close of his letters: *caute* – be cautious. This aligns with the Greek term φρόνησις (*phronesis*), or practical wisdom, as defined in Aristotle's *Nicomachean Ethics*. Democracy has not eliminated violence or ideological repression. Rather, it has opened up vast communicative spaces in which no single claim to truth can be assured – though many are asserted. Caution is therefore necessary, both in evaluating those who impose absolute truths and in determining when and where ideas should be expressed.[161] Wisdom alone is not sufficient – it must be exercised with

159 Zygmunt Bauman's reflections describe a world marked by constant change and negotiation, where individual freedom is always tempered by dependence on others and by factors beyond personal control (Toro, 2023).

160 A. Giddens's *Modernity and the Identity of the Self* (1991) is particularly relevant for its treatment of individual identity in the face of accelerating global transformations. His concept of ontological security suggests that, even amid instability and chaos, individuals can attain personal stability and direction through rational self-construction.

161 According to Valenzuela Cardona (2014), the two essential virtues that "require discursive reasoning are fundamentally two: wisdom and prudence" (Valenzuela, 2014, p. 35). It should be noted that Spinoza published his *Theologico-Political Treatise* anonymously in order to avoid censorship similar to that faced by his friend Koerbagh. Rumors disseminated by Jewish authorities later obstructed the publication of his *Ethics*, based on the accusation that it promoted atheism.

situational awareness. Parrhesia must not be used indiscriminately. As Konstan reminds:

> An aphorism attributed to Democritus says the following: parrhesia is intrinsic to freedom: the difficulty lies in having a diagnosis of the appropriate moment (καιρός). One must be very careful not to speak clearly to a friend when others are present, and to modify criticism with due praise. Everything depends on tact (Konstan, 2012, p. 2).

Given the widespread disillusionment with politics and democracy – as many people have lost faith in political promises – it is essential to sustain public debate in order to demonstrate that democratic societies are strengthened through the active participation of independent thinkers, critical voices, and those offering constructive proposals

Both ancient and modern democracies have been marked by errors and distortions that have weakened their functioning. Nevertheless, the emphasis here lies in the positive elements of democracy that contribute to a better society grounded in reason and emancipatory knowledge. Freedom of expression is vital, as is the pursuit of a shared and reasoned truth.

In line with deliberative democratic ideals and efforts to build more participatory societies, it is worth recalling Galeano's metaphor of utopia. Utopia may appear to retreat as one advances, but it nevertheless provides direction. "Utopia is on the horizon: I walk two steps, it moves two steps away and the horizon moves ten steps further. So, what is the use of utopia? It is useful for that: to walk" (Galeano, quoted in Chile, 2013, p. 4). The path forward involves highlighting the achievements of democratic processes, minimizing their historical failures, and treating democracy as an ongoing project.

In this task, *ratio* as reason and critical reflection, *libertas* as the ability to think and speak freely, and *phronesis* as practical intelligence regarding when and how to act remain essential tools for ideological debate in the construction of a more democratic society.

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Greek Democracy, Modern Democracy

Lights and Shadows

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The author has carried out a historical-sociological study to compare features of democracy in ancient Greece with the resurgence of the model in the modern era of the seventeenth century, beginning with the thought of Baruch Spinoza. Although these were very different periods and contexts in which concepts may hold distinct meanings, it is worth recalling what Benjamin Constant once affirmed: "Athens was the one which most resembles the modern ones".

Both in Antiquity and in Modern times, the democratic model has had its great successes and failures, its lights and shadows. While it remains a preferable system compared to the dictatorship of an individual or the oligarchies of powerful groups, it can also become a model where freedom is suppressed and the interests of a few prevail over those of the majority.

Here, a fundamental feature is highlighted: the freedom of every individual to think and to express themselves. The struggle is carried over into the ideological and political arena, where many groups seek to impose a post-truth outlook on the population's mind as a distortion of reality.

Finally, the work revisits the proposal of deliberative democracy.

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