

Whither Democracy in the Mediterranean Basin

By Gregory T. Papanikos*

Democracy was born in the Mediterranean basin alongside almost all the known political systems that currently exist in the world today. Since antiquity, the qualitative merits of the various political systems have been discussed in such masterpieces as in Herodotus' 'Histories' and Aeschylus' 'The Persians'. And, of course, in Thucydides' 'The Peloponnesian War', which includes Pericles's 'Funeral Oration'; a praise of the Athenian political system. In all these works, the various political systems were compared using qualitative (mostly ethical) criteria. However, the difficulty is to evaluate a democratic political system using a quantitative index. In this paper, I use two well-known indices of democracy (EUI and Freedom House) to evaluate cross country differences on the level and the trend of democracy in the Mediterranean basin. Based on this evidence, two main conclusions emerge. First, substantial differences exist between countries and group of countries in the Mediterranean based on geography. Second, an overall assessment shows that democracy in the Mediterranean basin area is declining.

Keywords: *democracy, Mediterranean Basin, isegoria, isonomy, isocracy, isoteleia, isopoliteia*

Introduction

This paper uses two well-known indices of democracy to evaluate the performance of the Mediterranean basin countries. The *Economist Intelligent Unit* (EIU) publishes an index of democracy based on five composite criteria. Similarly, the *Freedom House* measures democracy using two criteria. This paper uses these two measurements of democracy (a) to look at differences between the geographical block of Mediterranean countries as far as their democratic performance is concerned, and (b) to examine whether democracy is improving or regressing in the entire Mediterranean basin based on data from 2006 to 2022.

This paper is organized into four sections, including this small introduction. The next section proposes a theory of democracy based on five criteria explained in detail in my previous studies, especially my book (Papanikos 2020a): *Isegoria, Isonomy, Isocracy, Isoteleia and Isopoliteia*. The argument made in this section is that the performance of any political system—democratic or non-democratic—very much depends on the equal distribution of education and the virtue of each one of its citizens. In other words, it depends on equal distribution of a minimum level of pedagogy. I call this criterion *isopaideia*.

The third section of this paper presents and discusses the measures of democracy and looks at the trend of democracy in the Mediterranean countries

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during the last two decades. The last section recapitulates my main arguments and summarizes the main findings.

On the Theory of Democracy

Democracy is a mechanism to make decisions when a group of people with common interests convenes to discuss and choose different courses of action. The first such gatherings were made as part of a military expedition; Homer reports a number of such assemblies in both the *Iliad* and the *Odyssey*.¹

What differentiates this mechanism from any other mechanism of making decisions is the hypothetical equality of participants. At the level of a political unit (city, state, nation etc.), the most important decision is the adoption of a legal system (rules that govern how people should conduct their affairs) and the selection of leaders responsible to implement (execute) the adopted laws. In a democracy, the most important political entity is the individual who has the unbounded political right to participate.

How can any political system be evaluated? Criteria should be developed. In my previous work, I have proposed five such criteria which are shown here in Figure 1. I have extensively discussed these criteria in many writings, including a short book on democracy.² In this section, I will briefly discuss these five criteria as well as the role of *isopaideia*, i.e., the equal provision of education to all, as these have been demonstrated in Plato's ideal *politeia* and in many other dialogues. The theory presented here makes democracy a function of *isegoria*, *isonomy*, *isocracy*, *isoteleia* and *isopoliteia*. I will briefly discuss each one of these variables.

Isegoria means more than freedom of expression. The word is a synthesis of equal (ἴσος) and speak (ἀγορεύω) in front of an audience that is assembled to listen and decide on an issue. For the first time, this type of public speaking is mentioned by Homer (Papanikos, 2021a). Of course, freedom of speech (expression) is only a small part of *isegoria*. In a democracy, what is important is the equal right to speak in front of an audience that is willing to listen and then decide. In the ancient Athenian democracy, people will gather in the agora (a place and an institution) which was called the *ecclesia of demos* (the general assembly of all citizens). The process of deliberations will start when the *Cyrix* would call upon the members of the assembly with the phrase, "who wants to talk?" (τίς ἀγορεύειν βούλεται;). In modern, so-called advanced democracies, or what *Freedom House* calls *free* countries, the criterion of *isegoria* is not satisfied even though there is freedom of speech. Only a handful of citizens have the right to speak in front of an assembly

¹Homer mentions a number of meetings not only among soldiers who convene to make decisions, but among citizens to be informed by their rulers giving them the opportunity to express their vocal approval or discontent. These meetings happen both in *Iliad* and *Odyssey*. In Papanikos (2021a), I have identified ten such meetings in Homer's *Odyssey* where participants' opinions were heard after the dissemination of the relevant information by the authority who called the meeting.

²See Papanikos (2022a, 2022b, 2022c, 2020a, 2017a, 2016, 2011) and the comments by Meydani (2022) and Petratos (2022).

such as a parliament or congress which is making decisions that affect the lives of all citizens and not only those who participate in the decision-making body.

Isonomy comes from the two Greek words equal (*ἴσος*) and law (*νόμος*).³ It characterizes what it would be called today a “just” society. Democracy is a fair society and all its citizens are equal before the law. In a democracy, the rule of law prevails.⁴ *Isonomy* by itself cannot distinguish between a democracy and a non-democracy. The rule of law may also be a characteristic of a non-democratic political regime such as a monarchy where a king may decide and implement fair laws to all citizens without any exception, which applies to the king himself. In ancient Athens, Pisistratus (600-527 BCE) was an Athenian tyrant who, according to Plutarch, governed by respecting the laws established by Solon (see Plutarch’s *Parallel Lives: Solon*). The latter, one of the seven sages of ancient Greece, was called by all parties of Athens to set up rules and laws that everybody would respect. *Isonomy* is not only unique to democracy but it is quite possible that it is not the best political system to apply it. A monarch like a “philosopher king” may be better suited to apply *isonomy* rather than the democracy system which in many cases can turn into ochlocracy (mob) as discussed below.

Isocracy is the third criterion of democracy. The second word “-cracy” is first mentioned by Homer and appears either as a noun “strong force” (*κραταιός*) or as a verb (*κρατέω*) which may be translated as rule, hold power, govern. It means that each citizen has the same opportunity (chance) to hold power. The functional interpretation of the word is really very difficult. How do we apply *isocracy*? Technically, we can say that each citizen has the same probability of holding power as is the case when rulers are chosen by a lottery system. In ancient Athens, there were many offices whose officers were elected by the chance of a lottery system. On the other side of this story is political absenteeism both in voting and in running for office. Citizens are not interested in participating in the political process. This has been explained by many authors since antiquity. In the second half of the 5th century BCE, Pericles, facing a similar problem, paid the Athenian citizens to participate in the deliberations of the *ecclesia of demos*. Of course, citizens in an ideal democracy will be trained to consider as their ultimate duty and honor to participate in the political process. Even in the current imperfect political system, Carrera (2022) makes the argument for developing a participatory political culture through training.

The three criteria discussed so far are pretty well known in the modern discussion of democracy. The last two criteria of *isoteleia* and *isopoliteia* are not considered as part of democracy although are thoroughly discussed in the literature of optimal taxation⁵ and international affairs.

³It might also be interpreted to mean the equal distribution of political power from the Greek verb *νέμω* (distribute).

⁴Igwe (2021a, 2021b) discusses this issue using the case of Nigeria.

⁵One may make the argument that taxes are the true causes of any revolution. The Solonian revolution in the 6th century BCE in Athens had to do with restructuring the tax system as so masterfully is explained by Aristotle in his masterpiece of the *Athenian Politeia*. Similar arguments of the role of taxes can be made for the American and French Revolutions in the latter part of the 18th century.

Isoteleia means equal or fair economic contribution by all citizens and in many cases, non-citizens to public revenue. Equality here means that each contributes according to his wealth and therefore not a blanket amount of taxes. The first such known comprehensive system of taxation was proposed by Solon in the 6th century BCE in Athens. Fair taxation of income and wealth is usually a characteristic of democracy. Additionally, democracy is a very expensive political system and citizens should pay for it. *Isoteleia* implies that each citizen pays according to their ability. This may sound not so equal but it is indeed equality if we consider what is at stake. Rich citizens have much more to lose than poor citizens if democracy is abolished either by a foreign power and/or because of internal strife, as was the case during the years of Solon. As he himself argued in the very few excerpts that survived from his writings, the Solonian taxation system saved the rich because the poor wanted to take the land from the rich through a system of land distribution. Solon rejected this policy and instead formulated an optimal taxation system based on wealth. The level of wealth gave political rights as well which were eventually abolished by Cleisthenes and Pericles until all citizens had the same political rights irrespectively of how much taxes they paid. The actual choice was not between taxing or not taxing the wealthy, but between taxing wealth or confiscating it. Even in modern times taxing wealth guarantees this type of *isoteleia* without undermining economic growth (i.e., efficiency and effectiveness) as I have explained in Papanikos (2015).

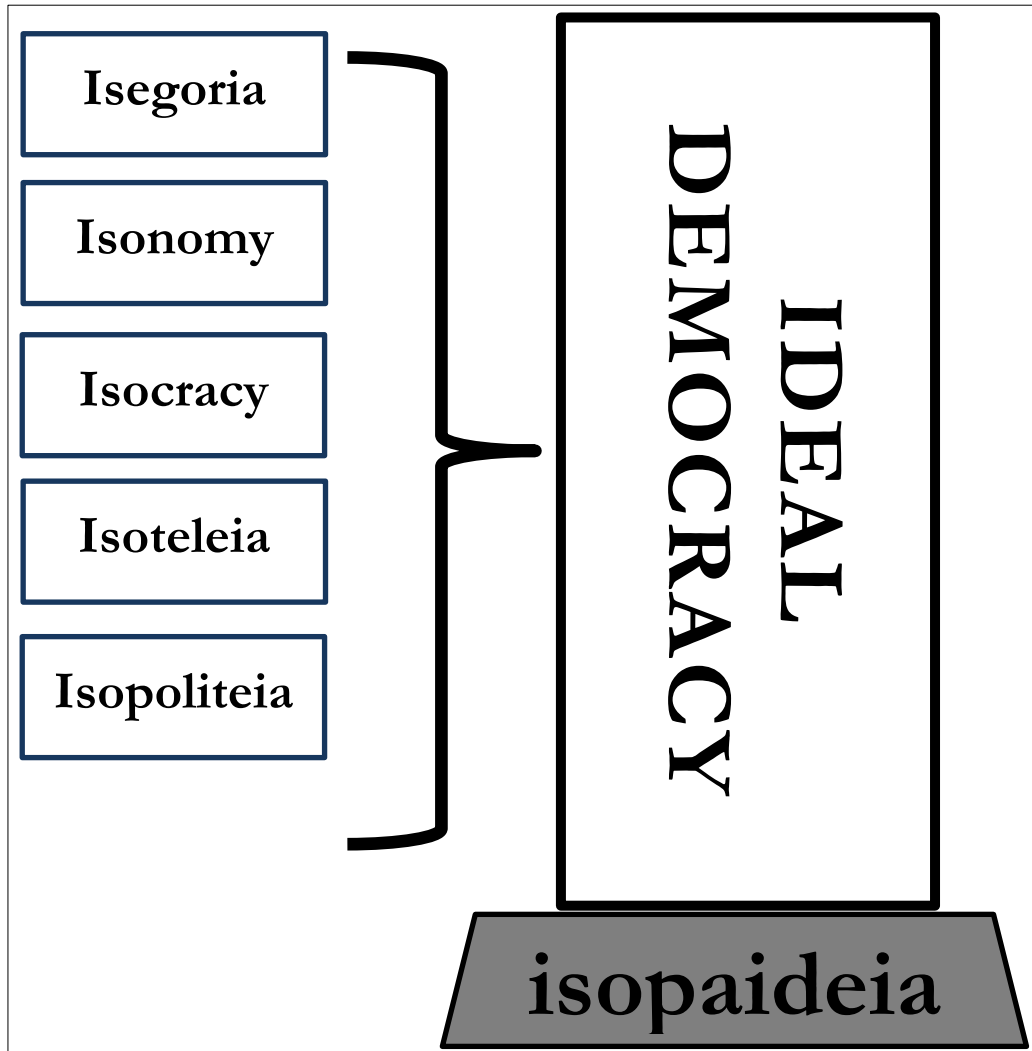
Isopoliteia deals with the relations of a democratic politeia with other independent states. Promoting democracy is only one part of it. Today this is called global democracy. However, it is very difficult to argue on deontological grounds how a democratic state can impose democracy on another state. The only alternative that seems more acceptable from an ethical point of view is to help other countries develop the necessary conditions which will lead to the adoption of a democracy as a political system. One such important condition already mentioned since antiquity is pedagogy, i.e., education with virtue. This important issue is examined next.

Figure 1 summarizes what we have already discussed. A true democracy must fulfill all five criteria. If these five criteria are met, then one may identify this political system as an ideal democracy. The most that modern democratic countries can do is strive to improve their performance in all five criteria of democracy. However, this is not an easy task. The whole foundation of an ideal democracy is based on education on a mass scale. All citizens should be educated.⁶ *Isopaideia* here means equality in education but this cannot be achieved without pain. All youth should be forced to learn; this is the *paideia* part. All youth should learn to behave with virtue; this is the *agoge* part. Both terms give us pedagogy which means education with virtue, or that education should aim at making virtuous citizens, or in ancient Greek, *καλός κάγαθός*. One argument that was raised in the literature is whether people without

⁶This issue has been extensively discussed in the relevant education and philosophy literature; see for example Verharen (2020). Other studies explore the idea of democratic values in the teaching process see for example Çelik et al. (2022) for Turkey; Coulter and Herman (2020) and Reid (2019) for USA; Parziale and Vatrella (2019) for Europe; Rafapa (2018) for South Africa.

pedagogy should be allowed to be elected to office, or even vote for those who run for office.

Figure 1. *The Five Criteria of an Ideal Democracy*



Taking this argument further, one may argue that what matters in creating an ideal political system is not the mechanism of making decisions but whether those who are making the decisions possess pedagogy. Thus, a political system as a thing in itself does not say anything about whether this society is characterized by eudaimonia or not.

Table 1 demonstrates the above argument. What matters is not the system but who leads the political system. The three well-known systems appear with two faces: the good and the bad.

A democracy can become an ochlocracy, which becomes almost inevitable when there is an economic and social crisis when extreme groups can exploit

the anomaly by disseminating misinformation always leading to intolerance.⁷ Citizens become a mob. If this mob becomes a majority and is democratically elected, then they are “politically” justified to take measures and implement laws that discriminate against the minority of any kind. This has happened many times in history by people who lacked if not only education, definitely lacked virtue.

Similarly, an aristocracy which is the political system in which the best rule can turn into an oligarchy which is usually identified as kleptocracy. Finally, monarchy can turn into a tyranny when the king or even a democratically elected leader becomes a dictator (a tyrant).⁸

Table 1. *Quality of Leadership and Political Systems*

| Leadership | Number | | |
|------------|----------|-------------|------------|
| | One | Few | Many |
| Good | Monarchy | Aristocracy | Democracy |
| Bad | Tyranny | Oligarchy | Ochlocracy |

Thus, to use Pericles’ definition of democracy⁹ in which decisions are taken by the many and not by the few, how many people rule does not guarantee an ideal democratic society. In general, the number of people who rule –one, few, many— is neither necessary nor sufficient to create an ideal society. It seems that without pedagogy that is equally distributed to all citizens, an ideal society is not possible under any arrangement of making collective decisions. To extend this argument further, only citizens with pedagogy can take into consideration the interests of the unborn which are affected by the democratic or non-democratic decisions of the current generation.

The five criteria of democracy as well as the concept of *isopaideia* are difficult to quantify. If everything depends on education and its equal distribution, one may argue that education can be quantified by the number of years in school or other indicators. But education is only one part of *isopaideia*. The other is virtue and this cannot be quantified; at least with the means that we have today.

In any case, the next section uses two well-known indices of democracy and applies them to the countries of the Mediterranean basin to examine differences between countries and groups of countries and trends. These indices do not measure the criteria of democracy as these were developed in this section. I will have more to say on this in the concluding section of this paper.

⁷The dissemination of information as a threat to democracy is examined by Marchetti (2020). See also Obot (2019) for the role of media in the democratic process.

⁸A special case is Brazil; see the analysis of elections in Brazil by de Caria (2022). In general elections with parties is questioned as well; see Fruncillo (2017).

⁹It is well known that in ancient Athens many people were excluded from voting including women. On the role of women during the democracy years in ancient Athens see Gilby (2021). The other group who was excluded were the non-Athenian free men (*περίοικοι*) and of course the slaves.

Measuring Democracy in the Mediterranean Basin

The Mediterranean constitutes an area of many different cultures, languages, political systems, religions, natural resources, etc., making it an interesting area to test various theories including a theory of democracy because of its many different political systems which offer researchers sufficient variations for their analyses.

In a series of papers, I have examined different aspects of the challenges and prospects that countries located in the Mediterranean basin are facing today. I have examined some facets of religious aspects using Hagia Sophia as a case study in Papanikos (2020b). The recent Russian invasion of Ukraine and its impacts on the MENA countries were analyzed in Papanikos (2022d), which is related to military spending and energy security in the area; aspects of both issues were studied in Papanikos (2015) and Papanikos (2017b) respectively. One of the thorny issues in the Mediterranean basin is the Turkish-Cypriot-Greek conflict which has deep historical roots that I have examined in Papanikos (2022e) and Papanikos (2021b), and more generally in Papanikos (2022f, 2021c, 2021d). Another important issue is the relations—especially the economic relations—between the European Union and the non-European countries of the Mediterranean basin. These have been analyzed in Papanikos (2008).

This section presents the data on democracy based on the two indices. Table 2 provides the raw data of the democracy score using the EIU index. The overall score is out of ten and the rank reported in the last column is the world rank. Figure 2 reports the performance of the countries in descending order. According to the EIU index the maximum value of democracy was achieved by France and Spain with 8.07 points followed by Greece with 7.97. Syria (1.4), Libya (2.1) and Sudan (2.5) are at the bottom of the list.

According to the *Freedom House* index of democracy (see Figure 3), the three countries which rank at the bottom of the list are the same as in the EIU index. Sudan, Libya and Syria score very low on the 100-scale index of democracy. At the top of the list, there are differences relative to the previous list but overall one may conclude that the two indices give pretty much the same measurements.

Both indices show considerable differences between the various regions of the Mediterranean as these are depicted in Tables 3 & 4. As shown in Table 2, the countries of the Mediterranean basin are grouped into four types of countries: European Union, Southern Europe, Western Asia and Northern Africa. Tables 3 & 4 paint the same picture. The European countries have, on average, much higher measures of democracy than in the Western Asian and Northern African countries. A t-test (not reported) shows that there is no difference in the mean of the democracy index between the European Union and the Southern European countries, but there is statistically significant difference between the European countries and the Western Asia and Northern African countries. On the other hand, a t-test shows that there is no difference between the Western Asia and Northern African Mediterranean countries. The results are similar if the *Freedom House* index is used.

Table 2. Democracy in the Mediterranean Basin Countries by Geographical Area

| Country (2022) | Area | Overall score | Rank |
|------------------------|----------------------|---------------|------|
| Albania | Southern Europe | 6.41 | 64 |
| Algeria | Northern Africa | 3.66 | 113 |
| Bosnia and Hercegovina | Southern Europe | 5 | 97 |
| Croatia | Southern Europe + EU | 6.5 | 59 |
| Cyprus | Western Asia + EU | 7.38 | 37 |
| Egypt | Northern Africa | 2.93 | 131 |
| France | Southern Europe + EU | 8.07 | 22= |
| Greece | Southern Europe + EU | 7.97 | 25= |
| Iraq | Western Asia | 3.13 | 124 |
| Israel | Western Asia | 7.93 | 29 |
| Italy | Southern Europe + EU | 7.69 | 34 |
| Jordan | Western Asia | 3.17 | 122= |
| Lebanon | Western Asia | 3.64 | 115 |
| Libya | Northern Africa | 2.06 | 151 |
| Malta | Southern Europe + EU | 7.7 | 33 |
| Montenegro | Southern Europe | 6.45 | 61= |
| Morocco | Northern Africa | 5.04 | 95 |
| North Macedonia | Southern Europe | 6.1 | 72 |
| Palestine | Western Asia | 3.86 | 110 |
| Portugal | Southern Europe + EU | 7.95 | 28 |
| Slovenia | Southern Europe + EU | 7.75 | 31 |
| Spain | Southern Europe + EU | 8.07 | 22= |
| Sudan | Northern Africa | 2.47 | 144 |
| Syria | Western Asia | 1.43 | 163 |
| Tunisia | Northern Africa | 5.51 | 85 |
| Turkey | Western Asia | 4.35 | 103 |

Source: Economist Intelligence Unit <https://www.eiu.com/n/campaigns/democracy-index-2022/>.

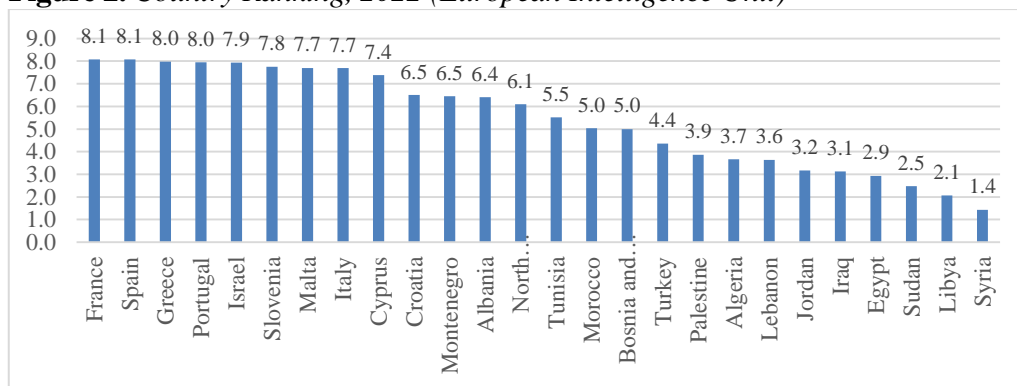
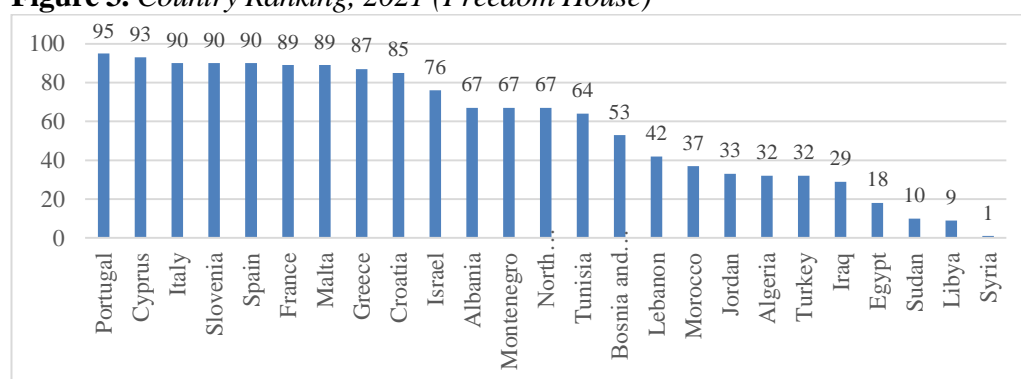
Figure 2. Country Ranking, 2022 (European Intelligence Unit)

Figure 3. Country Ranking, 2021 (Freedom House)**Table 3. Summary Statistics, 2022 (European Intelligence Unit)**

| Statistic | Total | European Union | Southern Europe | Western Asia | Northern Africa |
|---------------------|-------|----------------|-----------------|--------------|-----------------|
| Average | 5.47 | 7.68 | 7.14 | 4.36 | 3.61 |
| Standard Deviation | 2.18 | 0.49 | 1.01 | 2.21 | 1.40 |
| Maximum | 8.07 | 8.07 | 8.07 | 7.93 | 5.51 |
| Minimum | 1.43 | 6.5 | 5 | 1.43 | 2.06 |
| Number of Countries | 26 | 9 | 12 | 8 | 6 |

Source: <https://www.eiu.com/n/campaigns/democracy-index-2022/>.

Table 4. Summary Statistics, 2021 (Freedom House)

| Statistic | Total | European Union | Southern Europe | Western Asia | Northern Africa |
|---------------------|-------|----------------|-----------------|--------------|-----------------|
| Average | 57.8 | 89.78 | 80.75 | 43.71 | 28.33 |
| Standard Deviation | 30.9 | 2.95 | 13.45 | 31.00 | 20.87 |
| Maximum | 95 | 95 | 95 | 93 | 64 |
| Minimum | 1 | 85 | 53 | 1 | 9 |
| Number of Countries | 25 | 9 | 12 | 7 | 6 |

Source: <https://freedomhouse.org/countries/freedom-world/scores>.

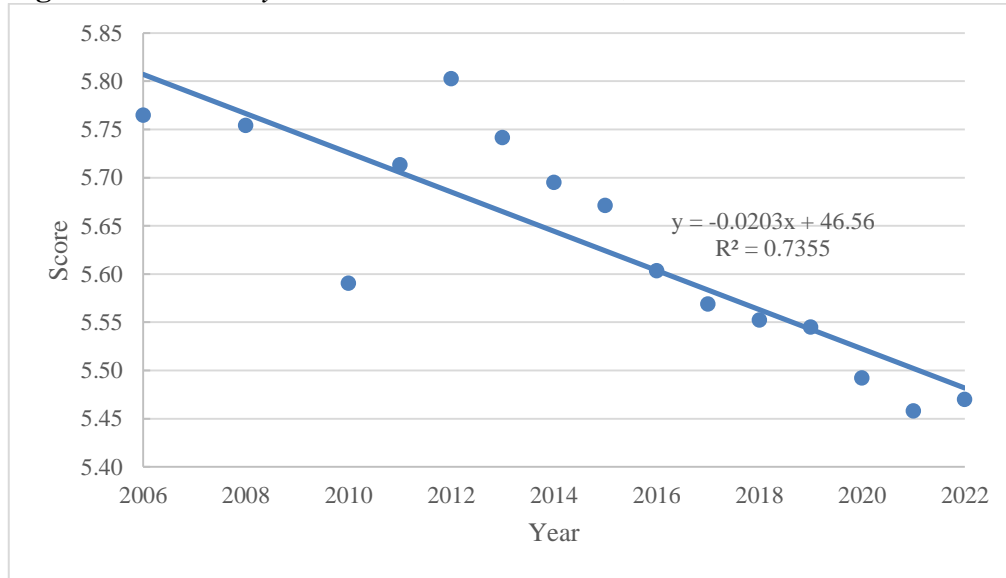
Is democracy declining in the Mediterranean countries? Figure 4 shows that this might be the case. The vertical axis depicts the average democracy score and the horizontal are the years from 2006 to 2022. From 2006 to 2012, the democracy index shows a non-Euclidean decline. The year 2012 marks the maximum value of the democracy index of the entire period (5.8 points). From 2012 until the last data available in 2022, democracy in the Mediterranean is constantly declining.

The EIU democracy index is composed of 60 parameters grouped into five categories of democracy: civil liberties, political culture, political participation, functioning of government, electoral process and pluralism. Figure 5 shows the breakdown of the EIU index in the Mediterranean. The weakest of all is the functioning of government followed by political culture and civil liberties. Stronger are the political participation (5.94) and the electoral process and pluralism (6.07).

The democracy index by *Freedom House* decomposes the index into civil liberties and political rights. Figure 6 shows the performance of democracy

according to these two indexes in the Mediterranean countries. The score of civil liberties is higher with a score of 34.68. The score of the political rights index is 23.12.

Figure 4. *Democracy in the Mediterranean Basin, 2006-2022*

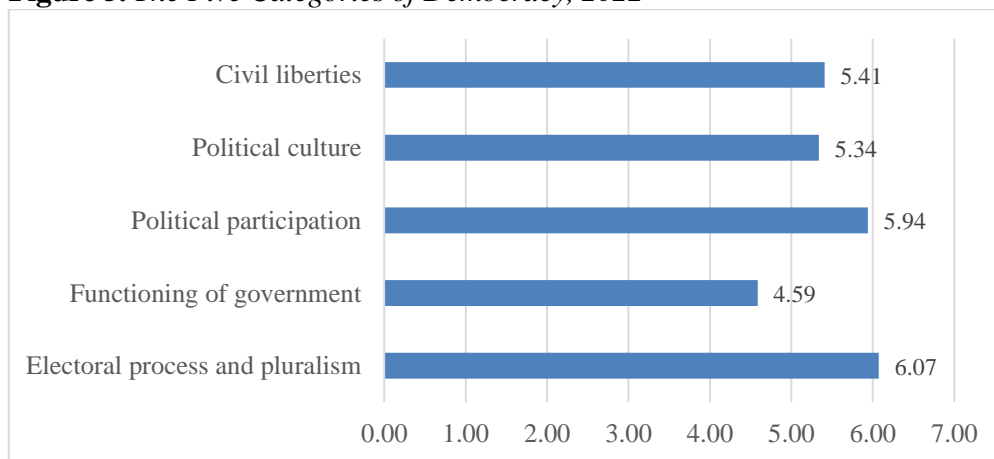


Source: European Intelligence Unit.

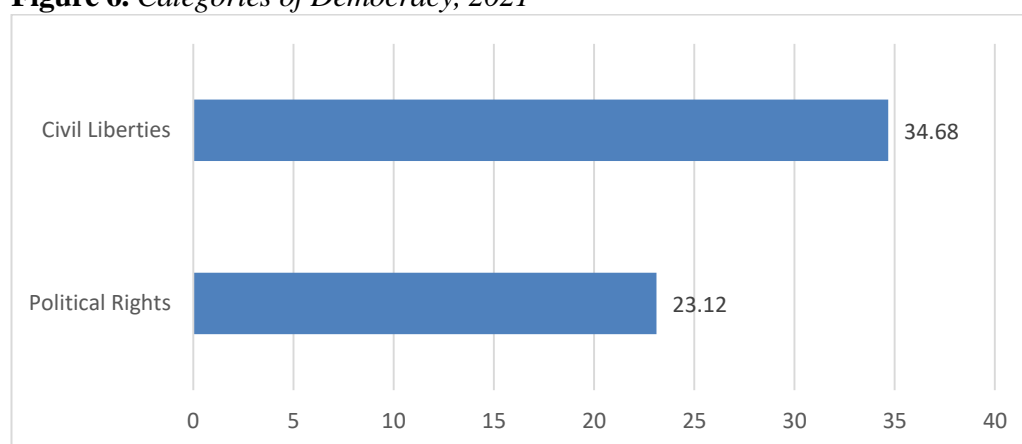
Note: The annual series of the democracy index starts in 2006 but data for 2007 and 2009 are not available.

Based on the democracy index and the scores achieved, the *Freedom House* classifies the countries into three types: free, partly free and not free. Figure 7 shows the number of Mediterranean countries in each category. Ten countries have been categorized as free, eight as not-free and seven as partially free. The raw data per country are given in Table 5.

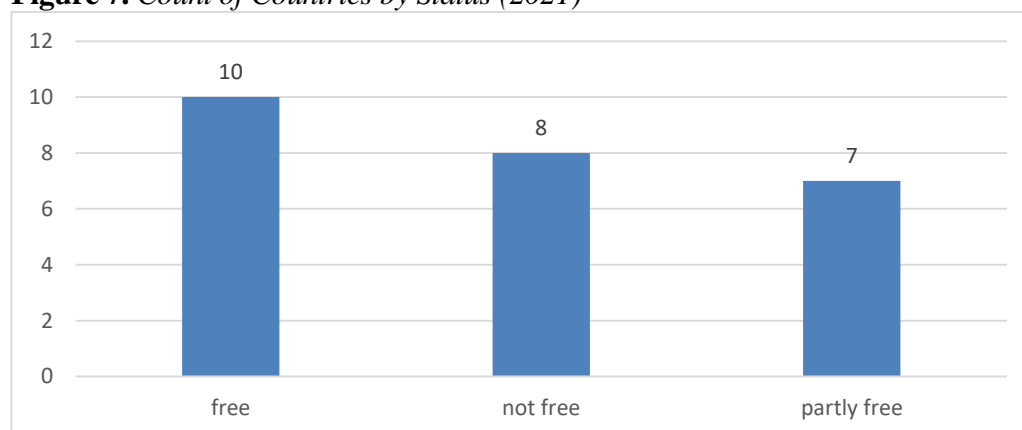
Figure 5. *The Five Categories of Democracy, 2022*



Source: European Intelligence Unit.

Figure 6. *Categories of Democracy, 2021*

Source: Freedom House.

Figure 7. *Count of Countries by Status (2021)*

Source: Freedom House.

Table 5. *Democracy in the Mediterranean Basin and Status*

| Country (2021) | Total Score | Political Rights | Civil Liberties | Status |
|----------------|-------------|------------------|-----------------|----------|
| Cyprus | 93 | 38 | 55 | free |
| Israel | 76 | 34 | 42 | free |
| Croatia | 85 | 36 | 49 | free |
| France | 89 | 38 | 51 | free |
| Greece | 87 | 37 | 50 | free |
| Italy | 90 | 36 | 54 | free |
| Malta | 89 | 35 | 54 | free |
| Portugal | 95 | 39 | 56 | free |
| Slovenia | 90 | 38 | 52 | free |
| Spain | 90 | 37 | 53 | free |
| Algeria | 32 | 10 | 22 | not free |
| Egypt | 18 | 6 | 12 | not free |
| Libya | 9 | 1 | 8 | not free |
| Sudan | 10 | 0 | 10 | not free |
| Iraq | 29 | 16 | 13 | not free |
| Jordan | 33 | 11 | 22 | not free |

| | | | | |
|---------------------------|----|----|----|-------------|
| Syria | 1 | -3 | 4 | not free |
| Turkey | 32 | 16 | 16 | not free |
| Morocco | 37 | 13 | 24 | partly free |
| Tunisia | 64 | 26 | 38 | partly free |
| Lebanon | 42 | 13 | 29 | partly free |
| Albania | 67 | 28 | 39 | partly free |
| Bosnia and Hercegovina | 53 | 19 | 34 | partly free |
| Montenegro | 67 | 26 | 41 | partly free |
| North Macedonia | 67 | 28 | 39 | partly free |

Source: Freedom House.

Conclusions

The purpose of this paper was to study cross-country differences in the Mediterranean basin using two well-known indices of democracy. It also examined the trend of the democracy index from 2006 to 2022. The two main conclusions are: (a) there are large—statistically significant—differences between the European and non-European countries of the Mediterranean basin, and (b) taking the countries of the area as a whole, democracy is declining in the Mediterranean basin.

These observations need further elaborations and country-by-country analyses which went beyond the purpose of this paper. However, one may contrast and challenge these indices of democracy with what was the meaning of democracy in its birthplace, i.e., ancient Athens during its golden age of the latter part of the fifth century BCE. One thing is certain: representative democracy would have been considered a mockery of the democratic process. The two most important differences between democracy and non-democracy are isegoria and isocracy. No country today can claim that it is a democracy because the criteria of isegoria and isocracy are not satisfied; not even by the so-called representative democracies. Even the criterion of isonomy can be better satisfied by non-democratic political systems. The rule of law can be applied more efficiently and effectively by an enlightened despotism rather than by a democracy, either its ancient Athenian version or its modern version of representative democracy.

After all, the ideal politeia suggested by Plato is one version of a political system of monarchy where the monarch (king) was a philosopher. This brings the discussion to education and virtue, i.e., to pedagogy. One may claim that if all people acquire pedagogy (education + virtue), then any political system is as good as any other. A monarch with education and virtue will make decisions and implement them which will not be any different from a system where the many rule as Pericles so profoundly defined Athenian democracy.

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