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The Path to Democracy: A Critical Evaluation of the Impact of Region on the Democratic Process in the Western Balkans

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Abstract

Purpose: The present research is placed within the strand of studies on the quality of democracy and state-building in the Western Balkans (WB). We aim to explore the impact that both variables have on each other and on fostering democratic values in the specific given region. **Methods:** The method implied for the present work is desk research based on cohort studies or the path of Democratic evolution of the region. Data results, scored by MAXQDA software for desk and cohort-comparative research, comparing the World Government Index (WGI), the Bertelsmann Stiftung Index (BTI), and Freedom House reports for trends and predictions for the WB in a 30-year continuum and democratic transition, from 1992-2022. **Results:** Descriptive statistics revealed a linear distribution of both variables in all the 6WB countries (M=1.33; Mtot=36.33; SD=22.017) meaning the same probability of partial democratic scores in all the Region's countries. Pearson correlation data revealed that there is a relation between the two variables (r_w=.642; p<0.05). Regressive analysis revealed a good variability and R_{square}=.612 indicating that both variables encountered of a total of 95% of the total variance and stability. Linear regression also revealed a good influence between the 6WB region and their democratic status, confirming our primary assumption (R=.642; Sig2. p=0.63<0.05). **Conclusions:** One of the detrimental addresses of the present work is related to the conceptions of "Democracy", "Geolocalisation", "Rule of Law" and "Political Stability" and their impact on the policy effectiveness of the WB. In the end, the authors recommend a broad technical review of the Region's Democratic Values and evolution achievements in the light of adherence to the European Union Value market.

Keywords: Western Balkans, democracy, geolocalization, democratic values, political stability.

1. Introduction

The paths of democratic consolidation of the states of the Balkan area are currently still for the most part incomplete, except for the systems part of the European Union, whose membership represents a guarantee of the results obtained. Democracy – a contraction of *demos and cratia* – is essentially the rule of people (both people themselves and through elected representatives), influenced and controlled by the people. *It is the government of the people, by the people, and for the people.* This is the idea behind it: people are the driving force behind everything that happens in the public sphere. This basic idea is central to any general definition

either of a "sensitive rule", "popular government", or "popular sovereignty" (Lai, 2019; Michels, 2015; Habermas, 2015; Schmitter, 2003).

According to the Freedom House 2022 report, both Slovenia and Croatia are considered democratic regimes, although the definition of established democracy does not is fully applicable to the Croatian case, which is one of the semi-consolidated democracies (Freedom House, 2022). As argued by Acemoglu et al. (2008), when considering a democratic and an oligarchic regime, we can go and analyze the effect of distortive policies. In the first case, we hypothesize that the key distortive policy is high taxation deriving from the need for greater redistribution causing a decrease in the level of investments, while in the oligarchic setting, the distortive policy that will tends to form is the creation of barriers to entry, whereby the oligarchs aim to keep demand lower and consequently pay lower wages. The study of the model shows that the distorting policies of different institutional arrangements affect differently over time. In the short term, the redistribution tax has a much greater impact than the entry barriers, so we can say that it is preferable to adopt an oligarchic system in the short term. Over time, however, the distorting effects of entry barriers become increasingly intense and taxes for redistribution will have a decreasing trend, as the redistribution policies adopted lead to a society with lower inequality rates. Faced with the situation, we can observe that democracy is preferable in the long run, as it favors development, especially in new sectors, where the oligarchy creates even more robust barriers instead. Here then is that, due to external isolation and the formation of barriers, the oligarchy finds itself in the long-term running much less than democracy, creating a growing gap in economic development. In recent years, the theme of the quality of democracy has assumed increasing importance in political science studies. Ulbricht (2018) proposes the following definition of a "good" democracy: "*the regime that creates the best institutional opportunities to realize freedom and equality*". In this proposal, the quality is declined concerning the content and therefore the two great values of democracy – freedom and equality – which, as seen above, are always remembered, and reaffirmed by most normative concepts. Then there is the quality understood in procedural terms, once concerning institutions, the rules, and their functioning. Lastly, an attentive look is given to the outcomes. Considering, therefore, the three dimensions of quality it can be said that a good democracy is "*that set-up stable institutional than through properly functioning institutions and mechanisms creates freedom and equality of citizens*" (ibidem). Roberts (2010) instead starts from the institutions. According to the author, the latter allows citizens to influence their government. In the modern world, these institutions are free, fair elections and civil rights allow citizens to express their opinions for and about their government. Citizens can influence the behavior of their government under other types of regimes as well, but this is not done through formal institutions. Only democracy formalizes and institutionalizes public influence over rulers. It is possible to have democratic institutions without citizens controlling their government. Starting from this observation, Coglianese and Dahl (1990), when identifying some opportunities or links between citizens and rulers, argue that democratic quality is "*the strength of the connection alternatively out of popular control.*" On the contrary, it is precisely this potential for influence that leads us to identify democracy with the government of the citizen. Democratic institutions allow citizens to control their government, but they do not guarantee that they exercise such control. The institutions of democracy are complex instruments. Citizens can use them to punish, select political orientations, and channel their preferences. Such actions tend to give them the kind of government they want, but there is no guarantee that citizens will seize these opportunities or that politicians will respond to the incentives they receive. In strong ties, citizens govern by controlling the work of the government.

This does not necessarily mean that the government will be better, but it will certainly be more democratic (Zaimi, 2021; Besley & Persson, 2019; Lundåsen, 2013; Agh, 1995). Following the footsteps of Manin, Przeworski, and Stokes (1999), Roberts points to three fundamental links to the basis of democratic quality: *electoral accountability, mandate responsiveness, and policy responsiveness*.

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Table 1. Freedom House Scores for the Western Balkans
and Reference Group in democratic values

Country	Total Score and Status	Political Rights	Civil Liberties
Albania	Partly Free (67)	28	29
Bosnia and Herzegovina	Partly Free (52)	18	34
Kosovo	Partly Free (60)	28	32
Montenegro	Partly Free (67)	26	41
North Macedonia	Partly Free (68)	29	39
Serbia	Partly Free (60)	20	40
Croatia	Free (84)	35	49
Slovenia	Free (95)	39	56

*Source: Freedom House, 2023.

2. Democracy in the Western Balkans

As regards the guarantee of access to political rights and civil liberties in the Western Balkans, Slovenia and Croatia have a degree of freedom in line with the EU average European Union, and in particular, Slovenia reached a score equal to ninety-four cents – equal to that achieved by Germany and higher than that attributed to Italy – while Croatia was assigned a score of eighty-five cents.

Table 2. Democracy scores for the Western Balkans and Reference Group

Country	Total Score and Status	Democracy Percentage	Democracy Score
Albania	Transitional or Hybrid Regime	45.83	3.75
Bosnia and Herzegovina	Transitional or Hybrid Regime	33.93	3.04
Kosovo	Transitional or Hybrid Regime	37.50	3.25
Montenegro	Transitional or Hybrid Regime	47.00	3.82
North Macedonia	Transitional or Hybrid Regime	47.00	3.82
Serbia	Transitional or Hybrid Regime	46.43	3.79
Croatia	Semi-consolidated democracy	54.17	4.25
Slovenia	Consolidated Democracy	70.83	5.25

Source: Freedom House, 2023.

A different scenario is instead the one described by the other countries of the Balkan region, defined in the Freedom House report as hybrid or transitional regimes. The main issues highlighted are represented by systemic corruption, the presence of inadequately contrasted organized crime, a scarce alternation of the political forces in power, insufficient independence of the judiciary, and a polarized political environment, often on ethnic grounds – particularly among the states of the former Yugoslavia. The fragile and incomplete democracies of the Balkans have also inevitably suffered from the events of 2020, which highlighted its structural weaknesses; the health emergency has in some cases represented an alibi for the introduction of restrictions that are not limited over time to civil liberties and highly controversial measures as well as changes to electoral laws and accelerated legislative procedures, the attribution of full powers to the

presidents of the republics and the indefinite declaration of a state of emergency and the postponement of elections as happened, for example, in Serbia or North Macedonia. This kind of action, combined with longer-term trends of democratic regression has led to the Freedom House downgrading Serbia and Montenegro from democratic – albeit not yet consolidated – regimes to hybrid regimes (Darmanovic, 2007). Overall, the path of democratic consolidation of the Western Balkans has recorded a decline with scores achieved in recent decades, which the last developments seem to have called into question. The risk of frustrating the efforts is concrete and has high costs in social and economic as well as political terms, also in consideration of the fact that the transition paths from the socialist authoritarian model to the liberal-democratic constitutional model of the Western Balkans have started late; the first competitive plural elections were held in 1990 in the Yugoslav republics in 1991 in Albania, and a relatively mild form, recording a change dominated by the previous communist elites, in the absence of strong oppositions in Serbia and Montenegro (Grimm & Mathis, 2017; Kalemaj, 2016). As a result, the Albanian transition turned out to be incomplete as well as much delayed, while in the case of the ex-Yugoslavia WB countries, the start of a more apparent transition process provided a boost to the claims of self-determination, then taken to the extreme during the 1990s – except for Slovenia. In Albania, the constitutional transition process started in 1991 had provided for the adoption of a provisional constitutional text of limited scope, pending the drafting of a constitution that would be later drafted by a special commission session of the People's Assembly in anticipation of the abrogation of the 1976 Constitution, progressively amended following the early elections of 1992 (Kushtetuta e RSH, 1992). The subsequent constitutional text would be approved in 1998, with the assistance of the Council of Europe through the Venice Commission but would have needed further revisions regarding the independence of the judiciary. According to the Freedom House:

> Albanian democracy was tested to its core in 2021 by the country's tenth multiparty parliamentary elections since the collapse of communism. The incumbent Socialist Party was reelected for a third term, a feat no political party had ever achieved in post-communist Albania, retaining 74 seats in the 140-seat Kuvendi, Albania's unicameral parliament (Hartz, 21). However, much of the pre-and post-election public discourse was filled with mutual recriminations and divisive rhetoric by leaders of the main political parties and the president, which led to incidents of public intimidation, injuries, and even deaths during the electoral campaigns). Based on the Electoral Code amended in 2020, the parliamentary elections included several novelties, such as electronic voting in several polling centers as part of a pilot project and preferential voting on party lists. The amendments allowed party leaders to run for the parliament in up to four districts at a time (Ligori, 2021).

In regard to ex-Yugoslavia, the first signs of innovation in terms of revisions of the constitutional reforms at the federal level and of the constituent republics had been registered in 1988, with an opening to the recognition of private property, and in the constitutional revision of 1990, which expanded the provisions concerning citizens' rights, guaranteeing, among other things, the full recognition of all types of property, and the recognition of the autonomy of courts and political pluralism. The constituent republics had moved in the same direction, with the elimination of the terms and symbols relating to socialism – Croatia, Slovenia – and the introduction of multi-parties and the reference to the freedom of political organizations and the prohibition of violent overthrow of the constitutional order – North Macedonia, Bosnia, and Herzegovina. Furthermore, in the case of Bosnia and Herzegovina, the ethnic element was central as a basis for political legitimacy. Overall, within the same constitutional revisions, the underlying secessionist tendencies are also recognized, with the elimination of Yugoslav symbols and, in the case of Slovenia, the proclamation of the superiority of the national constitution over the federal one. Following the dissolution of Yugoslavia, the successive constitutions adopted by the former constituent republics starting from 1992 reveal a mixture of elements inherited from the socialist past and others taken up by Western constitutionalism, with a large space dedicated to social rights and a residual provision of capital punishment alongside an expansion of rights, duties, and

freedoms of citizens (Vorpsi, 2023; Smith et al., 2021; Lavrič & Bieber, 2020; Milačić, 2019; Konitzer, 2013; Losoncs, 2013). The Constitution of Bosnia and Herzegovina represents a special case, the elaboration of which, contextually to the Dayton negotiations, is substantially other-directed, with a role preponderant of the c.d. Negotiation contact group. Serbia and Montenegro, on the other hand, have a text which was in force during the period of the confederal solution and the constitutional law of direct derivation of the "*Starting bases for the restructuring of relations between Serbia and Montenegro elaborated with EU intermediation*", adopted in 2003 and inclusive of a catalog of rights adopted separately in the "*Charter of Human and Minority Rights and Civil Liberties*" part of the Constitution itself (Keil & Perry, 2016; Greenberg, 2009). Following the secession of Montenegro, the process of drafting the Montenegrin Constitution took place with greater involvement of international actors, due to the need to present a second application for membership of the Council of Europe concerning one presented by the Union of Serbia and Montenegro; this entailed a higher level of protection of rights compared to what was foreseen according to the previous constitutional provision, an unnecessary requirement for the Republic of Serbia, as a successor state of the Union (Draško et al., 2020; Vetta, 2019; Presnall, 2009). The Serbian Constitution of 2006 was approved a few months after the official proclamation of Montenegrin independence, without intervention by the international community, and on the one hand provided greater certainty of property rights, a reduction of the space dedicated to social rights, and guarantees, and a discipline relating to the protection of minority rights that was more detailed but less advanced than that provided for in the 1990 Constitution. Elements of democratic regression have been recorded above a level of practice, going beyond the constitutional provisions by circumventing or forcing their limits; despite the presence of a Parliament formally elected according to democratic principles, the current conduct of the elections and the information underlying electoral choices are subject to the control of the dominant political forces, which, on the other hand, have a large portion of the means of communication as cash resonance for a permanent electoral campaign based on sovereigntist, nationalist and ethno-nationalist rhetoric, as demonstrated in the Serbian parliamentary elections of 2020 (Draško et al., 2020). The very functioning of the legislative assemblies was often reduced to a level barely sufficient to approve the budget necessary for the maintenance of the Bosnia and Herzegovina Assembly (2019) and their representativeness was undermined by the marginalization of the opposition (Keil & Perry, 2016). Another characteristic of the path of democratic transition in the Balkan countries is the strong influence of external actors, linked to the resolution of the conflict in former Yugoslavia before the adherence to membership of the European Union or international organizations such as the Council of Europe and NATO; in particular, it stands out in the context of the so-called catalog of rights a conditional script, common to the Balkan states as a whole, a guided script – Albania, North Macedonia, the Union of Serbia and Montenegro, and finally Montenegro – and of internationalization of the constitutions of Bosnia and Herzegovina and, Kosovo. If on the one hand, this has favored better structuring in cases such as the Albanian constitutional context, on the other hand, this presents the corners of a democratic deficit of the adopted constitutions, as regards the Bosnian-Herzegovina, contained in attachment no. 4 of the 1995 Dayton Accords, and elaborated in a purely international context (Gafuri, 2021; Mujanović, 2018; Meurs, 2018; Grimm & Matthis, 2017; Silander & Janzekovitz, 2012; Vuckovic, 1999).

3. The route to the EU membership

The credibility of the enlargement process has inevitably suffered from the discontinuity shown by both sides. The leaders of the Balkan countries themselves are involved in the question of the credibility of their commitment to membership, which is inextricably linked to the issue of democratic consolidation. Even signals of a potential change of direction in a democratic sense have favored the opening to a dialogue on the European perspective of the area,

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as happened for Greece, Spain, and Portugal in the years of their adherence: the fall of the Milošević regime in October 2000 was, in fact, one of the major contributions to the normalization of relations with the governments of the Balkan countries, qualified to start from Feira Council as potential candidates for EU membership, the inclusion among the beneficiaries of the program of CARDS financial assistance, the development of contractual relations with the European Union and the extension of the asymmetric trade measures adopted against other Balkan States (Milačić; 2019; Kontzier, 2013; Pond, 2012). Although it is necessary to note how the effectiveness of the protection tools provided by the EU against authoritarian tendencies is anything but obvious, as demonstrated by the cases of Poland and Hungary, European integration and democratic consolidation can therefore be defined in terms of a two-way relationship of strengthening – or weakening – reciprocal: a lower commitment shown in terms of democratic consolidation slows down the accession process, as well as being a possible indicator of reduced interest. In this sense, the democratic decline currently underway in the Western Balkans, particularly marked in Serbia since 2013 and between 2008 and 2007 in North Macedonia (Kmezić, 2020; Hehir, 2020; Kmezić et al., 2014; Dawisha, 1997), can be viewed as a symptom of a growing indifference towards the prospect of membership and the commitments connected to on the part of the respective political elites. As noted in the World Governmental Index (WGI), the rule of law and democratic consolidation have presented and still represent fundamental and mandatory requirements for the construction of a privileged relationship with the European Union, up to the prospect of actual membership, also to minimize the risk of including politically and economically unstable members (Kmezić, 2020; Kmezić et al.,2014). The Balkan scenario today places the European Union in front of a further challenge compared to the integration of the countries of the former USSR, considering that the process of European integration develops simultaneously with the process of democratization but also of state-building in the context of the long Yugoslav post-war status (Potter, 2017; Bianchini & Minakov, 2018; Bassauner, 2016). But it might be worth citing, the fact that in the enlargement of the 6WB States the European Union was called to face the state-building issue (Bianchini & Minakov, 2018). On this front and on that of mediating conflict situations, it is possible to refer to the experience of the European impact in the context of crisis management between Podgorica and Belgrade, in which the incentive of the prospect of joining the European Union had been functional to reaching a compromise (Habermas, 2015). A similar mechanism, which outcomes are however still to be defined, can be seen in the mediation facilitated by the EU in the dialogue between Serbia and Kosovo regarding the recognition of the latter as a state entity independence and the normalization of diplomatic relations between the two countries (Silander & Janzekovitz, 2012). In both cases, in addition to providing guidance and a practical incentive conditional on the achievement of results, the intervention of the Union stands as a confirmation of the commitment on the European side to keep the prospect of membership concrete, showing a stable and long-term commitment in the area. The effectiveness of conditionalities and transformative power of European integration, however, fails if the EU institutions fail to demonstrate this commitment in practice and with a certain continuity. Below is a summary of the BTI democracy progress of the 6WB countries group.

Table 3. Summary of BTI democracy index 6WB to reference group

	Albania	Bosnia and Herzegovina	Kosovo	Montenegro	North Macedonia	Serbia	Croatia	Slovenia
Ranking Economy Status	**35**	**35**	**47**	**25**	**21**	**26**	**13**	**4**
Economy Status	**6.25**	**6.25**	**5.96**	**6.82**	**7.14**	**6.71**	**7.96**	**9.11**
Level of Socioeconomic Development	5.0	6.0	5.0	6.0	6.0	6.0	8.0	10.0
Socioeconomic barriers	5	6	5	6	6	6	8	10
Organization of the Market and Competition	8.3	7.3	6.8	8.3	8.5	7.5	9.3	9.8
Market organization	7	5	5	7	7	7	8	10
Competition policy	8	7	6	8	8	6	10	9
Liberalization of foreign trade	10	9	9	10	10	8	10	10
Banking system	8	8	7	8	9	9	9	10
Monetary and Fiscal Stability	7.0	8.0	7.0	7.5	8.0	7.5	8.0	9.0
Monetary stability	8	9	8	9	9	8	9	10
Fiscal stability	6	7	6	6	7	7	7	8
Private Property	6.0	7.5	7.0	8.0	8.5	7.0	8.0	10.0
Property rights	6	8	7	8	8	7	9	10
Private enterprise	6	7	7	8	9	7	7	10
Welfare Regime	6.5	5.5	5.5	7.0	7.0	7.0	8.0	9.0
Social safety nets	6	6	5	7	7	7	8	9
Equal opportunity	7	5	6	7	7	7	8	9
Economic Performance	6.0	5.0	6.0	5.0	6.0	6.0	7.0	8.0
Output strength	6	5	6	5	6	6	7	8
Sustainability	5.0	4.5	4.5	6.0	6.0	6.0	7.5	8.0
Environmental policy	5	4	4	6	6	5	8	8
Education / R&D policy	5	5	5	6	6	7	7	8

4. The present study

4.1 *Materials and methods*

4.1.1 *Purpose*

The present article aims to explore the relationship between geographical belonging to democracy development with a special focus on the Western Balkans.

The methodology of the present work is desk research and cohort-qualitative based on the BTI index and Democracy indices in the Western Balkans in a longitudinal study from 1992-2022.

4.1.2 *Research design*

This study is of predictive typology because it seeks to predict the influence of the constant variable on the independent one. We referred to the BTI Transformation Index which includes the following criteria to assess Democracy Ranking in the WB:

- **Stateness;** which is seen as a precondition to democracy is included in the definition of political transformation and examined through questions related to the *state's monopoly and use of force and basic administrative structures including the rule of law and separation of powers;*

- *Persecution of office abuse and Civil rights.*

- *State Identity and the Interference* (or not) of religious dogmas.

- **Political participation:** the second criterion focus on free and fair elections.

- *Effective power to govern.*

- *Association/Assembly rights and Freedom of expression.*

- *Stability of political institutions*: the third criterion includes the performance and commitment to political parties.

- *Political and social integration*: the last criterion includes the party system, interest groups, approval of democracy, and social capital.

4.2 *Data analysis*

The statistical program MAXQDA for qualitative research and content analysis was used for the collected data of the present study.

5. Results

The following table presents descriptive statistics of the study variables: region and democracy status. The indices show a total arithmetic mean equal to M=1.33 and M=36.33 in both variables. In variability, it is seen that Ranking Democracy scores maintain a high dispersion (SD=22.017). It is also seen that both variables maintain a positive asymmetry in the distribution which means that there is a low tendency toward scoring.

Table 4. Descriptive statistics for the relation of 6WB to their ranking democracy status

Descriptive Statistics			
	Mean	Std. Deviation	N
Region	1.33	1.000	6
Ranking Democracy Status	36.33	22.017	6

The following table introduces the Pearson correlations between study variables, geographical placemen,t,t, and democracy ranking. As it can be deduced, a relationship between the geographical placement (the 6 WB) and democracy status is positive (r_w=.642)

Table 5. Pearson correlations between 6WB countries Region and their democracy status

Correlations			
		Region	Ranking Democracy Status
Pearson Correlation	Region	1.000	.642
	Ranking Democracy Status	.642	1.000
Sig. (1-tailed)	Region	.	.061
	Ranking Democracy Status	.061	.
N	Region	6	6
	Ranking Democracy Status	6	6

To fully understand the region's impact on democracy status, we performed a linear regression. Referring to the correlation variables in the Model Summary, a value of 0.4 is considered significant. The present R=.642 which reveals a good variability and R_{square}=.612 reveals that there is enough influence between the 6WB region and their democracy status.

Table 6. Regressive analysis between the 6WB countries and their democracy status

Variables Entered/Removed			
Model	Variables Entered	Variables Removed	Method
1	Ranking Democracy Status	.	Enter
a. Dependent Variable: Region			
b. All requested variables entered.			

Model Summary				
Model	R	R Square	Adjusted R Square	Std. The error in the Estimate
1	.642ᵃ	.612	.528	.820
a. Predictors: (Constant), Ranking Democracy Status				

ANOVA[a]					
Model	Sum of Squares	df	Mean Square	F	Sig.
1 Regression	3.293	1	3.293	4.896	.063[b]
Residual	4.707	7	.672		
Total	8.000	8			
a. Dependent Variable: Region					
b. Predictors: (Constant), Ranking Democracy Status					

As can be inferred by the ANOVA indices, these results estimate a Sig2. p=0.63<0.05 which confirms the impact that the region has on ranking democracy. These indices are also in line with the index of the coefficients table below.

Table 7. Coefficient scores of regions and ranking democracy status

Coefficients					
Model	Unstandardized Coefficients		Standardized Coefficients	t	Sig.
	B	Std. Error	Beta		
1 (Constant)	.275	.551		.498	.633
Ranking Democracy Status	.029	.013	.642	2.213	.063
a. Dependent Variable: Region					

Following is a set of graphs that give some details of the influence of the Western Balkans and their reference group countries (Croatia and Slovenia) on the democracy ranking. As it can be inferred, the ratio between the 6WB regarding their reference group countries is visible. Despite Slovenia, Croatia, Serbia, and Montenegro (14%), Albania (12%), Bosnia and Herzegovina (11%), North Macedonia (10%), and Kosovo (7.8%) have a relatively low trend of consolidating their democratic state to the region.
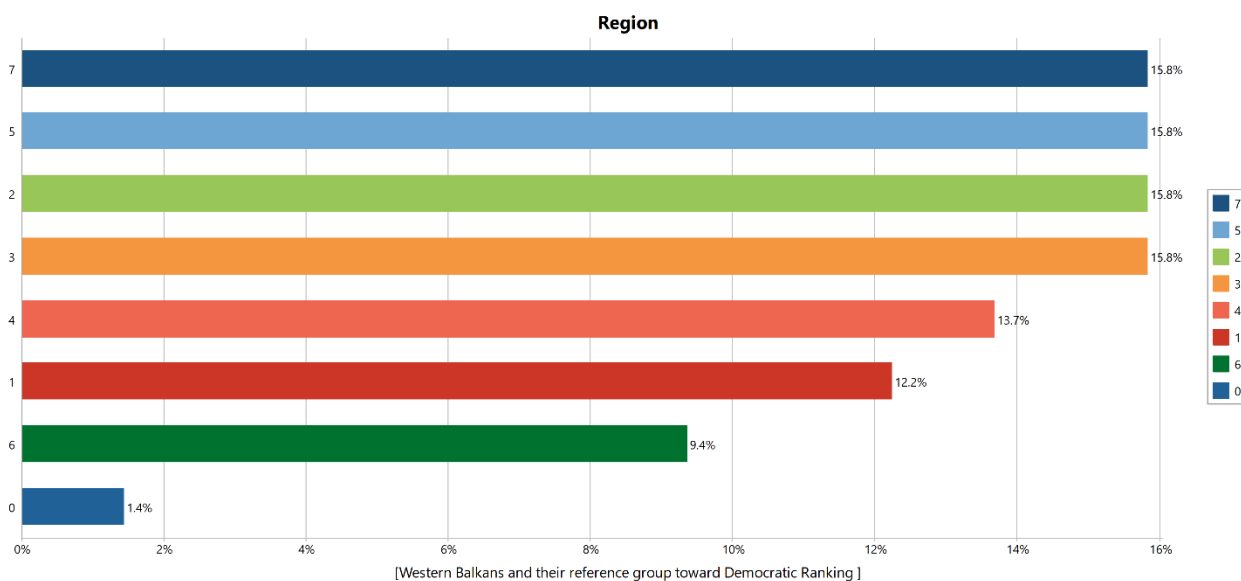

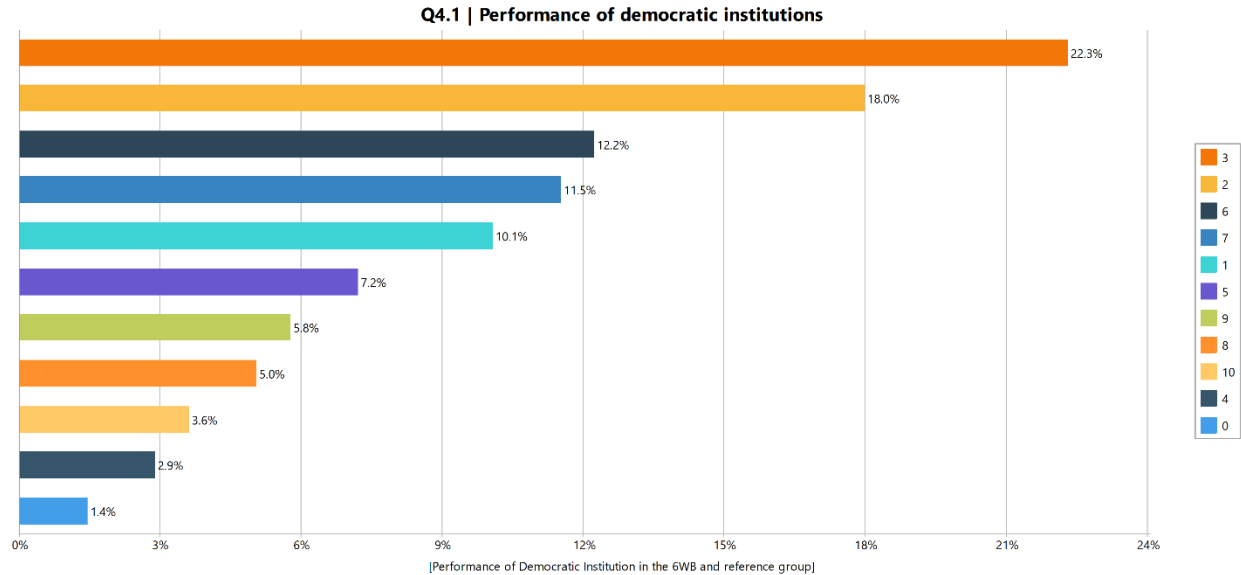Figure 1. Relation between Region and democratic ranking

Figure 2. Performance of democratic institutions in the 6WB and their reference group

Regarding the performance of the democratic institutions in the 6WB, the highest performance relates to Montenegro (12.2%), Bosnia and Herzegovina (11.8%), and North Macedonia (10.1%) while Albania (5.8%), Serbia (2.8%) and Kosovo (1.4%) have the lowest scores. This means that the public sense and trust in institutions are much fragile in Albania, Serbia, and Kosovo although their political engagement is to improve and increase the public support for the administration and institutional policies. Corruption and state capture in WB is considered a double cause-consequence concern in terms of the lack of democratic institutions (Radeljić, 2018; Ritcher, 2012; Montinola & Jackman, 2002; Treisman, 2000).

6. Discussion

In the current paper, we were interested in examining the relationship between regional belonging and the level of democracy, i.e., the Western Balkans and their democratic path. Our objective was to analyze the impact of the region on the current democracy development and predict if there is any significant role of the previous to the latter. Data results, scored by MAXQDA software for desk and cohort-comparative research, comparing the WGI, BTI, and Freedom House trends and predictions for the Western Balkans in a 30-year continuum and democratic transition, from 1992-2022. We referred to the BTI division of the democracy transformation index.

Referring to the level of democracy we compared the current scatter scores of the 6WB to their most similar reference group, Croatia, and Slovenia. Our results revealed that there is a relation between the two variables (r_w=.642; p<0.05). Regressive analysis revealed a good variability and R_{square}=.612 indicating that both variables encountered of a total of 95% of the total variance and stability. Linear regression also revealed a good influence between the 6WB region and their democratic status, confirming our primary assumption (R=.642; Sig2. p=0.63<0.05). These findings are also supported by the research of various scholars who showed the impact that geographical placement has on the democratic route (Smith et al., 2021; Fukuyama, 2020; Milačić, 2019; Kablamaci, 2018; Potter, 2017; Streklov, 2016; Rodrik, 2016; Konitzer, 2013; Schmitter, 2003; Diamond, 2002; Power, 2000).

7. Conclusions

The advent of democracy has attracted attention in recent decades, not only from social scientists but also from economists, curious to perceive elements that could associate the democratic regime with the subsequent economic development. This paper aimed to analyze the relationship between democracy and regional placement focusing on the special case of the Western Balkans. The democratization processes combine with other phenomena, such as social development, political stability, rule of law, accountability, economic growth, and welfare. The social and economic development that has been triggered is a very long process in the Region, concerning most of the countries that have undergone democratic transitions, making scholars argue that have a huge influence on the democratic path.

The results of the present research, based on a vast desk research analysis, revealed that being in a 6WB region had a significant impact on the establishment of a democratic route (R=.642; Sig2. p=0.63<0.05) and that there is a linear distribution of both variables in all the countries (M=1.33; Mtot=36.33; SD=22.017) meaning a same probability of partial democratic scores in all the Region's countries. Future research should be placed on revealing the impact of this fragile democracy status on the ability and attractiveness of the Region in terms of domestic and foreign diplomacy and stability.

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School Discipline and Greek Education: Conceptualizations and Ideological Implications

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Abstract

The purpose of the present study is to explore middle school teachers' views on discipline. The qualitative research method was used. The participants in the research consisted of 21 middle school teachers. The teachers in our study conceptualized discipline as a tool of orderliness, orienting individuals to conscious compliance with rules. School discipline can affect students' social inclusion and social control. Some also referred to its ideological orientation. School discipline is implemented directly or indirectly, with educational policy and institutions playing essential mediating roles.

Keywords: discipline, middle school, teachers, Greece.

1. Introduction

Discipline is conceptualized in the literature with negative or positive meanings (Kyridis, 1999). Due to its presence in discourse in various areas of everyday life, its accurate definition by the social sciences or humanities is quite challenging to be attributed to (Lytras, 1983: 42). Weber states that the rapid growth of discipline as a worldwide phenomenon continues unabatedly and diminishes the significance of charisma and personally differentiated agency as political and economic needs are rationalized (Solomon & Kouzelis, 1994: 364). Durkheim (1925/1961) approaches discipline as a regularity of life experience based on normative restrictive principles essential to social ethics. Discipline is the obedience to rules that govern the behaviour and actions of individuals in a social reality (Kyridis, 1999: 27). In the social context, discipline is systematized and gradually established according to it (Aravanis, 1996; Solomon & Kouzelis, 1994: 106). Foucault (1977, 170) stated that discipline:

> "'makes' individuals; it is the specific technique of a power that regards individuals as objects and instruments of its exercise … The success of disciplinary power derives no doubt from the use of simple instruments: hierarchical observation, normalizing judgment, and their combination in a procedure that is specific to it, the examination."

It is a "physics" or an "anatomy" of power, a technology. The disciplines imposed on the bodies and powers of individuals ensure their subordination and utility (Foucault, 1989: 183). Discipline is a mechanism of social control that supports socialization and the transmission and internalization of a society's cultural values, attitudes, and perceptions concerning new social subjects. Weber referred to "rational discipline as an organized practice performed

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unconditionally and uncritically, but also as an internal adaptation of the individual exclusively to this purpose. Through the practice of submission to discipline, the 'dominated' individuals are socialized into 'blind' obedience" (Solomon & Kouzelis, 1994: 274). According to Elias (1982), social discipline is defined as the sum of several subsystems that ensure the functioning of society in a visible or hidden way. The subsystems aim to integrate and internalize the society's value system and social functions and establish a homogeneous social entity with self-control, as well as processes to legitimize its methods of disciplining. Discipline has as its primary goal the maintenance of social cohesion and stability and the avoidance of social disorganization through methods and strategies of socialization. According to Gramsci (Nova-Kaltsouni, 2010: 108), discipline is not related to coercion and restraint or perceives the individuals as passive recipients, annihilating their personalities. On the contrary, it is an element that contributes to the limitation of arbitrariness and impulsiveness, enabling the society to live together smoothly and cohesively (Nova-Kaltsouni, 2010: 106-108).

- The teachers conceptualized school discipline as a tool of orderliness, orienting individuals to conscious compliance with rules.

- School discipline affect students' social inclusion and social control.

- Some teachers referred to school discipline as ideological orientation.

- School discipline is implemented directly or indirectly, with educational policy and institutions playing essential mediating roles.

The concept of discipline is conceived in terms of governance and the formation of socially regulated bodies/individuals/spirits, "has historically characterized modern forms of the exercise of power" (Solomon, 1994, in Solomon & Kouzelis, 1994: 8), without, of course, referring to the use of violence. Discipline is based on establishing a set of rules which enable individuals to shape and regulate their behavior in the context of their everyday and social lives. In other words, it allows them to control their behavior, i.e., to acquire self-management, self-control, and self-restraint, to coexist as socially and culturally integrated beings. However, it is a persistent and constant process that demands considerable time for the necessary acquisition of knowledge, which is accomplished through the process of education (Solomon & Kouzelis 1994: 7, 8)

2. School discipline

School discipline is approached either as a tool for the school's functioning, as part of the educational process, or as a means of reproducing social structures (Kyridis, 1999: 27-39). Theorists thus refer to school discipline as a tool, a means, for establishing orderliness and appropriate functioning of the school context (Anagnostopoulou, 2008; Matsangouras, 2003) and implementing its goals (Kapsalis, 2006). With the implementation of evaluative and disciplinary rules and arrangements, the school introduces social control and rationalizes the functioning of societal roles (Durkheim, 1922/1956). School discipline is associated with a "mechanism for preventing and suppressing the emergence of sources of annoyance for educational practice" (Kyridis, 1999: 27-28). Socializing processes result from internalizing values and norms, leading to self-discipline, consensus, and social order (Durkheim 1956, 1961). School discipline is considered a "mechanism to prevent and suppress the emergence of sources of disturbance to educational practice" (Kyridis, 1999: 27-28). Socialization processes result from internalizing values and norms, leading to self-discipline, consensus, and social order (Durkheim 1922/1956. 1925/1961). At the same time, Foucault (1989) stated that the process of surveillance is not just a parameter of educational reality but a dominant component of teaching, being responsible for its effectiveness. Education was the disciplinary response to the necessity of controlling the growing population. The dominant mechanism for imposing discipline is the continuous examination,

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which presupposes observational techniques, obedience, and conformity of trained subjects. As a cultural and ideological product, the knowledge delivered in school depends on discipline because "there is no discipline without having reference to the production of knowledge or its reproduction, as well as there is no knowledge production or its reproduction without referring to discipline" (Solomon & Kouzelis, 1994: 7). Discipline cannot be understood without producing or reproducing knowledge (learning) and vice versa. These concepts coexist, inter-contain, and mutually intersect while contributing to forming and building "ways of controlling, governing, and constituting subjects in contemporary societies" (Solomon & Kouzelis, 1994: 7). Discipline refers to boundaries and normative regulatory standards that, through symbolic (or non) violence (Bourdieu, 1994), can govern individuals (body and spirit) and their socialization (Solomon & Kouzelis, 1994: 7). In this context, "deviance" is related to the ideological-political social model and the ex officio authority of the teacher to impose sanctions on individuals who "deviate" from the socially and educationally acceptable. New social subjects learn to self-discipline and legitimize social processes and interpretations through educational processes that shift the normalized locus of control from the social context within the individual.

The implementation of discipline techniques in school involves the shaping of spatiotemporal boundaries through rituals and hierarchies of surveillance. Normative, punitive, and examinational processes are instrumentalized by functioning in a conformist or corrective way, legitimizing the normalized and institutionalized mechanisms of power and individual categorization (Foucault, 1989). In earlier times, corporal punishment was one of the first ways of enforcing discipline (Owen, 2005). In the contemporary era, verbal observation, persuasion, negotiation, and direct consequences of misbehavior (e.g., compensation for damage) are encouraged.

3. Cultural capital concept

Education imposes a particular type of culture, this of the dominant class, through a process that Bourdieu termed "symbolic violence" (Swartz, 2003). Bourdieu (1994) mentions that symbolic violence aims to establish and legitimize cultural arbitrariness as an objective reality, which accomplishes its purpose when the context and mechanisms of its enforcement are not socially explicitly recognized. Through "symbolic violence," "arbitrary" values, attitudes, perceptions, and ideas are reproduced as legitimate realities. These are cultural crystallizations of the dominant culture through complex ideological processes and the exclusion of other diverse perspectives of social reality. Those from dominant social classes, due to their economic power, can produce, shape, and reproduce their "culture" for the other members of society through "symbolic violence" (Bourdieu, 1994).

"Symbolic violence" is the imposition of systems of symbolism and meanings on groups or social classes so that they are experienced as legitimate. This legitimation conceals power relations, while through culture, it achieves their systematic reproduction (Bourdieu, 1994). Bourdieu sees "symbolic violence" as an inextricable way of enforcing normality and discipline in school without this being readily understood (Swartz, 1997). The exercise of "symbolic violence" aims to establish and legitimize cultural arbitrariness as an objective reality, which achieves its purpose when the context and mechanisms of its enforcement are not socially recognized. "Symbolic violence" is the imposition of systems of symbols and meanings on groups or social classes in such a way that they are experienced as legitimate. This legitimation conceals power relations while it achieves social reproduction through culture (Mills, 2008). Bourdieu argues that "symbolic violence" is an irreducible way of enforcing normality and discipline in school without this being easily conceived (Swartz, 1997). Through "symbolic violence," "arbitrary" values, attitudes, perceptions, and ideas are reproduced as legitimate realities. These constitute the cultural crystallizations of the dominant culture through complex ideological processes and the

exclusion of other perspectives of social reality. Because of their economic power, dominant social class members can produce, shape and reproduce "culture" for the rest of society through "symbolic violence" (Bourdieu, 1994). The conceptualization and constitution of social reality through education are not neutral. However, they are shaped by the ideological-philosophical approach of educational policy and the dominant groups' pressures to impose their cultural and ideological norms. Schools, either by persuasion or coercion through social control, aim at disciplining individuals (Schwartzenberg, 1984: 133-134), legitimizing the dominant ideology and norms as an objective reality. These are inscribed into social subjects through learning, practice, and integration as values and stereotypical knowledge of the contextual culture. Discipline can be found in the practices of social interaction, not as an abstract concept, but as an integral part of externalized behavior inscribed in the body, which functions as a means of memorization of the cultural codes and practical taxonomies of habitus through social learning (Csordas, 1994; Jenkins, 1992; Turner, 1992). Individuals' variations regarding the defined and accepted norms in the educational system are rejected as unacceptable and, in many cases, marginalized. In this context, discipline is a mechanism for governing individuals and groups and is linked to politics and power (Solomon, 1994: 7). The educational institution shapes the framework for controlling and constituting new social subjects, school performance, and abilities (Sarakinioti & Tsatsaroni, 2011). Individuals in school internalize rules and principles of the institutionalized hierarchy, rules and principles of the dominant ideology, and an ability to manage them for the advantage of the privileged. School teaches individuals skills and ensures compliance with the dominant ideology (Althusser, 1971: 133; Levine, 2003). The association between discipline and educational practices is not solely concerned with a particular educational system and its implementation time and space. However, it is part of a broader context of globalized comparable educational policies (Giavrimis, 2022b).

4. Educational policy in Greece: Legislation and research

The Hellenic-Christian ideal prevailed at the beginning of the modern Greek educational system at the end of the 19th century. Furthermore, discipline was more corporal punishment until the middle of the 20th century. In the 1950s and 1960s, the new division of labor, the latest technological tools, the human capital theory, and the movement for more accessibility in the educational system differentiated the modes of discipline and the "technologies" of its application, using more indirect ways. In the 1960s, the imposition of the state dictatorship regime, as well as the overthrow of democracy, had a significant impact on society and the country's educational system. The school was forced to teach the political and religious ideals imposed by the dictatorship. Punishments at school were strict, and the usage of violence by teachers was common even for insignificant reasons, such as being late for morning prayer time. An attempt to modernize education in Greece can be observed in the 70s, as the educational system stopped supporting corporal discipline as a means of student compliance. However, there was still punishment for extracurricular activities, such as not attending religious activities or inappropriate behavior. In the 80s and 90s, discipline was imposed only to ensure that school order was restored, without including corporal punishment, even to the slightest degree. Pedagogical methods played a dominant role, while dialogue was emphasized. In recent years, corporal punishment has been legally banned in education, and students have rights and responsibilities. Education nowadays emphasizes the principles and values of a democracy (Al Sampagk, 2020a, 2020b; Kyridis, 1999; Zafireiadis & Sousamidou, 2004: 107-113).

In contemporary Greece, based on the Constitution of the country (Article 16, par. 2[1]), on Presidential Decree 79 (Gov. Gazette 109/A/ 01.08.2017) regarding the organization and operation of education, as well as the hierarchical operation of the educational system, it can be characterized as centralized (Brinia, 2009), bureaucratic and ethnocentric (Giavrimis, 2022a; Koumentos, 2019). Through school discipline, education aims to reproduce and maintain the social cohesion of Greek society's particular social, economic, and cultural characteristics, rewarding passivity and compliance (Spala, 2010: 393). In the context of the above, the issue of discipline in public schools is regulated by the latest decisions published in the Government Gazette (Gov. Gazette 120/B/23.01.2018, Gov. Gazette 109/A/1-8-2017) and the annual government circulars in public schools. Accordingly, the abovementioned regulations impose rules and restrictions, such as the school timetable, the hierarchical distribution of subjects, and a list of activities allowed within the school community (Circular F7/109171/D1). Furthermore, regarding the pedagogical actions and measures for the functioning of the school, according to article 30 of the Gov. Gazette 2005/B/31.05.2019, specific actions are specified, such as:

> "1. In each school, the Teachers' Council decides on the measures it considers necessary for the organization of school life in a way that establishes a positive school climate of communication, dialogue, and trust between teachers and students and informs the Parents' Council and the Student Communities" (Gov. Gazette 2005/B/31.05.2019, 22786).

At the beginning of the school year, the Teachers' Council, in cooperation with the students, should establish a framework of rules that will contribute to the better organization and operation of the school, known as the Framework for the Organization of School Life. (Gov. Gazette 2005/B/31.05.2019). Article 32 states:

> "Students must follow the rules of school life, as defined by the legislation in force and the Framework for the Organization of School Life…. Any act or omission contrary to them is subject to pedagogical control and is addressed by pedagogical means".

Art. 31 (Gov. Gazette 2005/B/31.05.2019, 22787) defines the actions and methods that the Teachers' Council must perform to educate students to respect the variety of roles and to realise the necessity of respecting school rules.

> "It must use all available means (e.g., consultation meetings with supportive educational structures, mediation process) to deal with deviant behavior. In cases of students who do not improve their behavior, the Teachers' Council shall take measures, which are: (a) verbal warning, (b) reprimand, (c) suspension from classes for one (1) day, (d) suspension from classes for two (2) days, (e) change of school environment" (Gov. Gazette 2005/B/31.05.2019, 22787)".

Circular F7/109171/D1 describes procedures for supervising and observing pupils. The classroom teacher is the educator responsible for performing the specific task, e.g., "Responsible for supervising the students during the lesson is the teacher who teaches the lesson. The teacher enters the classroom with the pupils and leaves at the end of the lesson when all the pupils have left, accompanying them to the schoolyard'. In addition, specific patterns of behavior and action are promoted, e.g., regarding congregation and prayer for pupils: "Before the beginning of the school day, a morning prayer for pupils and staff is held in the schoolyard under the responsibility of the teachers on duty. Attending pupils of other religions at the school prayer is not compulsory" (Presidential Decree 79/2017 art. 3 par. 3 and art. 18 par. 1, Ministerial Decree 98268/D1/2021).

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[1] Government Gazette 187/A'/28.11.2019, Art. 16, par. 2: "Education is a basic mission of the State and aims at the moral, spiritual, professional and physical education of Greeks, the development of national and religious consciousness and the formation of free and responsible citizens."

Furthermore, to evaluate and describe the student's behavior ("The behavior of each student is described as 'excellent,' 'good' or 'mediocre'"), in addition to these measures, certain rewards are defined for students who have achieved an excellent school performance or its improvement, as well as for students who show positive behavior, and for students who are outstanding for their contribution, selflessness, and solidarity (Gov. Gazette 2005/B/31.05.2019, Art. 32, 22788).

The above is implemented through the legislative framework of the educational policy and forms fields of delimitation and regulation of the organization of school life. Surveillance, evaluation, and interventionist procedures are part of educational practices shaping a restrictive school space characterized by social control (e.g., through assessments, punitive sanctions, rewards, and examinations), conformity to dominant norms, and discipline.

Research has shown that student discipline in Greece remains low (Gruber, 2020). Kapsalis (2006: 678) stated, "It is difficult to assess the intensity of disciplinary problems in schools since there are no relevant epidemiological studies in Greece. However, an empirical survey shows that 20% of school principals rank discipline problems as the third most important issue they face. Greek studies revealed that restrictive approaches address discipline (Beazidou et al., 2013; Grigoropoulos, 2022; Kyridis, 1999). The reasons for applying such educational methods are associated with the absence of teachers' training in alternative methods of discipline and their effectiveness (Zarra-Fluda & Konstantinou, 2007) and their professional prestige (Aloupi, 2012). Research has shown that teachers' imposition of punishments or rewards depends on their gender, age, and years of service. Women and young teachers more often apply rewards to their students (Aravanis, 2000). Poverty, social inequalities, and social exclusion can be causes of students' indiscipline (Zachos et al., 2016). In Greece, studies by Andreou (1998), Aravanis (2000), Chatzivassiliou (1988), Ignatiadis (1986), and Zafiriadis and Sousamidou-Karamperi (2004) examined the school discipline and issues related to the practice of punishment/rewards. Discipline strategies are grouped as either positive reinforcements (rewards, compensations) or restrictive approaches (punishment, verbal reprimands, time out) (Beazidouet al. 2013).

The above review of the relevant literature concerning research on school discipline in the Greek educational system revealed insufficient data for the island of Lesvos (Greece). The present study explores the views of Lesvos' middle school teachers regarding discipline. The research questions addressed how teachers conceptualize discipline (sense, functions, forms, outcomes) and what factors mediate the practice of discipline.

5. Method

The qualitative research method was used. Qualitative research involves a naturalistic and interpretive approach to social phenomena in their natural context via the individuals' discourse and their interpretive schemas (Denzin & Lincoln, 2005). In addition, qualitative research approaches social phenomena by conceptualizing the acting subjects and their social action as a complex symbolic construction adopting reflection processes (Tsiolis, 2014).

5.1 *Participants*

The participants in the research consisted of 21 middle school teachers in Lesvos. Twelve were female, and nine were male. Their age ranged between 28- 53 years. At the same time, the years of service were between 1-29 years. Middle education was chosen because it is compulsory, has no specialization in socialization processes, and the elective education process needs to be differentiated. The primary pursuit is conformity (Durkheim, 1922/1956). According to the theoretical framework of cultural capital (Bourdieu, 1973), there is the first interaction of

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the individuals with the cultural capital of the educational system, its arbitrary elements, and symbolic violence. At the same time, teachers are part of the process of social reproduction (Bourdieu, 1994), and the approach of their conceptualizations of discipline increases the chances of reducing the mediation of education in it.

Table 1. Demographic characteristics of participants.

Years of experience		Age	
1-5 years	2	Up to 3 years old	2
6-15 years	5	31-40 years old	7
16-25 years	9	41-50 years old	9
26 years and over	5	51 years and over	3
Area			
Urban	12		
Suburbs/rural areas	9		

5.2 *Research tool*

The semi-structured interview was used as a research tool. The interview guide for discipline included six themes. In particular, the first thematic axis concerned the definition of discipline and its forms and contained questions of the type: "How would you define the concept of discipline in education?", "what forms of discipline exist in schools?" The second one concerned the causes of the phenomenon's presence and included questions of the type: "What are the reasons, in your opinion, for which students can accept some form of discipline?" The third thematic axis refers to those characteristics of the students that characterize them as undisciplined and the influence of the following factors: age, gender, and social factors. Emphasis is also placed on the contribution of the family and school in shaping the child's character and the underlying causes of the child's reaction to school discipline. Included type questions: "Why do you think some students react to school discipline?" The fourth one had questions regarding the characteristics of the teacher. More specifically, it asked whether both age and gender, as well as geographical factors, play a role and what the preferred attributes of a teacher are. Furthermore, whether and to what degree teachers' personal experiences and everyday life influence their behavior, as well as whom teachers are considered more sensitive to punishment in school. It included questions: "In what way does the teacher's everyday life often influence his/her behavior?" The fifth thematic axis concerned the effectiveness – both positive and negative – of discipline in education and included questions of the type: "What are the consequences of applying discipline in school" and "What changes are observed in the student who receives a form of discipline." The last thematic axis concerned the impact of educational policy, as well as the economic crisis on the educational system and discipline issues. Furthermore, it explores the role played by religion and the media and includes questions such as: "How does educational policy affect the implementation of discipline in middle school?"

Regarding the reliability of the research, two criteria were used: "long contact experience" and "participant control" (Simeou, 2007). As for the first one, the researchers have experience implementing school discipline in middle school education on a teaching pedagogical and theoretical level. Five pilot interviews were also conducted, transcribed, and given to the interviewees to test the reliability of the written discourse. Regarding the study's validity, the transferability and confirmability criteria were followed. In describing the findings, a coherent and vivid representation of the conclusions was adhered to and their documentation through the interviewees' discourse (Simeou, 2007).

5.3 *Research procedure*

In the present study, the method of thematic analysis was selected. Essentially, it is a method that identifies patterns within the data, allowing the researcher to understand the research data in depth. Thematic analysis is valuable for studying data collected from open-ended research questions such as focus group discussions or interviews. In this research, coding was then carried out after the data was collected through semi-structured interviews. The central unit of analysis was the sentences, paragraphs, or the whole interview text (Kyriazi, 2010). In addition, coding was guided by concepts drawn from existing literature and theory. The next step was categorizing the data into multiple categories and sometimes subcategories. In the end, the processing of existing ideas and concepts was conducted.

In addition, research restrictions refer to the need for more generalization of findings and the limited research location on the island of Lesvos. Another restriction is the possibility of changes in the Greek educational system regarding discipline from the period in which this research was conducted until now. Further research on the topic would also help achieve a comparative study between island regions and urban centers and a comparative survey between Mediterranean countries.

6. Findings

Based on research conducted among middle school teachers, the teachers' conceptualization of school discipline and the perceived factors that influence it are presented. Thematic analysis was used to analyse the teachers' discourse. Thematic analysis is a method that identifies, describes, reports, and thematizes meaning patterns derived from research data (Clarke et al., 2015). Initially, coding was performed, and then the meaningful patterns and thematic axes were classified (Tsiolis, 2018). In particular, the topics that emerged through the thematic analysis of teachers' discourse were the definition of school discipline, its functions, its forms, and mediating factors in its implementation. The sentence was used as an analytical unit (Kyriazi, 2010). Validity was maintained through the participants' self-verification of the interviews (responder validity) (Mays & Pope, 1995), while the categorization's effectiveness was ensured through objectivity, exhaustiveness, appropriateness, and mutual exclusion (Tsiolis, 2014).

6.1 *Conceptualization of discipline*

Most teachers conceptualize discipline as a tool for orderliness and conscious compliance with rules that maintain order, respect, values, and democracy without undermining freedom or promoting mere obedience to authority.

> "…it is certainly something that teachers use as a necessary means of being able to maintain control of all students in class" (E3).

> "…it is the conscious obedience to the rules which the educational system establishes … to ensure classroom order, considering of course respect and democracy as primary and self-evident values" (E1).

> "It is a set of rules concerning the pupil's behavior to which they must conform" (E12).

> "…I do not have in mind discipline as absolute and unwilling obedience to authority, annihilating children's freedom. On the contrary, children should be allowed to express themselves" (E15).

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6.2 *Functions of discipline*

Regarding the functions of discipline, most teachers mentioned:

(a) The school of students' inclusion. By applying discipline, the organization and smooth functioning of the classroom are maintained. The student is circumscribed and is not externalized by delinquent and disruptive behaviors, leading to better social inclusion. They believe that discipline assures harmonious coexistence, respect, and co-existence, helps teach and maintain values, prevents disorder, handles school assignments and activities, and fosters healthy cooperation between students and teachers.

> "The being of people in a society is governed by laws that ensure harmonious coexistence. In this way, children learn that certain rules determine their interaction with others they must follow to maintain values, carry out school obligations and activities, and have healthy collaboration and coexistence" (E11).

They consider discipline necessary to avoid breaking the rules, preventing student weaknesses, boundary overstepping, insolence, and avoiding deviant or delinquent behavior and racist comments.

> "If, for example, children cause a problem in class or activities, fail to cooperate, disrupt the unity of the group in any way, or display some kind of deviant or delinquent behavior, the school and the teacher should intervene to bring them back into the classroom by reminding them of the rules" (E7).

(b) The social control of students: In the context of the social control imposed by the school, students sometimes conform and occasionally demonstrate resistance. The students' resistance was expressed as aggression, inappropriate behavior, isolation, poor school performance, and a decline in critical skills.

> "…to control, to stop, …the escalation of misbehavior…" (E5).

> "On the contrary, education as a broader concept requires discipline for the proper assimilation of right, good, values and ethics by children…" (E19).

> "When some students cross the line, show disrespect, or become insolent and reactive, they may be punished…" (E21).

Finally, two teachers referred to the critical and ideological orientation of learning. They mentioned knowledge promotion towards a specific ideological direction. The ideologies of the social environment have interdependent relations with school and education… (E10).

> "…discipline can enhance the student's critical thinking skills…" (E3).

> "Through history, we have realized that political ideology and discipline are interdependent. It is evident through the differences in education across the different political regimes and their ideology…" (E6).

6.3 *Forms of discipline*

Teachers distinguished three forms of discipline: direct, indirect, and self-discipline. Direct discipline is an unacceptable form of discipline and is associated with the dominant figure of a teacher who behaves in an intolerable and challenging way. They characterize it as an extreme form of old-time that causes pain and fear.

> "… teacher informs children about the established rules and how to respond positively to them…" (E1).

> "Physical discipline, on the other hand, is a more extreme form that we encountered mainly in schools in the old days …" (E5).

> "But the ones that predominate are expulsion, hourly absences, banning the student from participating in school trips, events, etc." (E12).

Under indirect discipline, they classify practices such as providing information about the applicable rules, gentle and respectful comments, reinforcing desirable behaviors, encouraging, rewarding, patience, and perseverance. However, they perceived that the most prevalent forms of discipline are suspension, hourly absences, and not allowing students to participate in school activities. A teacher pointed out: "By motivating, encouraging, and rewarding children, they direct and recognize desirable behaviors and adopt them…" (E1).

Teachers stated that the school attempts to shape a sense of self-discipline, which takes place through various methods (e.g., positive rewards, disapproval) and directs individuals to set limits on their behavior and facilitate the learning processes. Teachers referred: "…even if they are self-regulatory rules…" (E4) and "…there must be self-discipline first of all…" (E15)

6.3.1 *Negative effects*

In some cases, teachers observed a negative effect as they stressed that over-discipline is antipedagogic and that students are affected by the teachers' unfairness among children regarding discipline or that discipline sometimes seems to restrict the student's freedom, "will", and impulsiveness.

> "I consider exaggeration to be bad in general. Moderation is best…" (E11).

> "If considered unfair by the student … it can intensify aggressiveness…" (E20).

> "…feels oppressed, that he cannot freely express himself, communicate and generally behave. He generally feels that he is not free and is confined…" (E2).

> "…discipline constrains the "wills"… (E8).

6.4 *Factors mediating implementation of discipline*

6.4.1 *Education policy in the period of economic crisis*

According to the teachers in our study, the educational policy during the economic crisis in Greece created a context of insecurity and uncertainty that determined the practices applied. At the same time, ideological factors modify the implemented educational policies into either conservative or liberal ones.

> "…if we provide some examples such as the reduction in school expenditure, the reduction in the number of teachers, the increase in the size of the number of pupils in merged classes and, on the other hand, the emotional factor" (E9).

> "The right-wing ideology is more conservative, the left-wing ideology is more liberal, and that can, of course, depend on what ideology is in place and represented…differentiate the discipline, to be more liberal, let us say, or more strict" (E18).

6.4.2 *Cultural and social capital of the family*

They further mentioned that undisciplined students are influenced by their family's cultural and economic capital. Thus, impoverished families due to poverty increase the possibility of delinquent behavior. Social control is achieved based on the family's cultural capital.

> "… who come from impoverished families who are below the poverty line…" (E1).

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"The family certainly plays a role in shaping the child's personality..." (E5).

"Many children realize the inadequacy of their parents to support them, and they also feel insecure in their own country sometimes... harsh economic conditions, then everything tends to go to the edge, and children become more undisciplined, and school becomes more strict" (E4).

"They set principles...all families when they provide proper orientation, nurture, childcare at home" (E21).

6.4.3 *Media*

Teachers also argued that the media impacts students as it is a powerful agent of social control, e.g., by watching television, they become more violent. A teacher mentioned: "Media affects the implementation of discipline as students watch TV and become more violent and therefore punishments are imposed by teachers..." (E2).

6.4.4 *Religion*

Regarding the influence of religion on enforcing discipline, they believe it influenced discipline in earlier times when sin symbolized the violation of the rules of Christianity or the ethics expressed by the church. This affects the daily behavior of some teachers nowadays.

"...they will attempt to 'conform' the child with "God will punish you" phrases..." (E3).

"You have sinned because you have broken the rules of Christianity – as long as we are talking about ... Therefore, you are not a good Christian. Therefore, God will punish you with misfortunes..." (E1).

"I believe that religion does not affect discipline for the worse at all. I just believe that it affects it positively because students if they are involved in religion, become calmer..." (E12).

7. Discussion

The present study aims to investigate middle school teachers' views on discipline. The research questions addressed how teachers conceptualize discipline (sense, functions, forms, outcomes) and what factors mediate the practice of discipline. Regarding the first research question, teachers conceptualized discipline as a tool of orderliness, directing individuals to conscious compliance with rules that ensure order, respect, values, and democracy without undermining freedom. In addition, teachers defined discipline as compliance with pre-agreed regulations, as a condition of persuasion, in the sense of rationale and reasoning, and as a situation with a dynamic character. Regarding the functions of discipline according to teachers of our research, these are related to (a) school inclusion of students and the circumscription of students' behavior, (b) social control of students, while two teachers mentioned the critical and ideological orientation of educational policies (conservative-liberal). These are achieved through direct or indirect discipline and the fostering of self-discipline. The concept of discipline is presented as a tool that has a crucial position in the learning process. At the same time, it is not a crystallized concept but is modified and updated according to the framework of time and space (Kyridis A., 1999: 27-39). It is claimed that to know, the use of discipline is necessary to achieve "the government of minds and bodies" and, therefore, "the government of individuals" (Solomon & Kouzelis, 1994: 7). As agents of social positions, teachers accept their role in the system and act within the school context in a way that reproduces the dominant culture (Nova-Kaltsouni, 2010:

109-110). Although there is relative autonomy in the applied ideology, it leads to the exact mechanism of "reproduction and conformity," directing deterministically to the dominant applied disciplinary practices.

Concerning the second research question, according to the teachers in our study, the factors that mediate the implementation of discipline are (a) the educational policy implemented during the period of the 2009 economic recession and COVID-19 in Greece, which established a framework of insecurity and uncertainty that acts as a differentiating factor of the practices implemented, but also of the public and institutional discourse, and (b) institutions, such as the family and its cultural and economic capital, the media and the religious. Disciplinary practices in the school context are embedded in continuous structural politics, manifesting symbolic violence favoring privileged actors (Bourdieu, 1994). Other institutions act supportively in the context of the implementation of educational policies and historically arbitrary, objectified cultural constants (Bourdieu, 1973). Hence, disciplinary practices, either in a direct punitive form (although corporal discipline is considered a finite corrective form) or indirectly, as they appear in institutional discourse and teachers' implementing policies, highlight a cultural hegemony in the curriculum. Discipline represents a necessary orientation basis for "mora" and "rational" behavior and a means of constructing one's identity (Deakin et al., 2018).

The symbolic discourse of the legislative texts and the teachers interviewed regarding discipline outline the legitimation of arbitrary cultural processes in the Greek educational system, which function as symbolic violence (Bourdieu, 1994). It operates restrictively by socially controlling students' interactions with teachers, peers, and curriculum subjects. Symbolic violence and discipline stigmatize undisciplined students, imposing social coercion instead of choice and free decision (Blackledge & Hunt, 1985). Teachers make arbitrary decisions regarding student behavior, reproducing social and educational inequalities (Bourdieu, 1995), holding the majority in decision-making school committees, and the legitimacy of student representatives by participating in these committees. Through symbolic violence and the corresponding disciplinary means, the internalized cultural capital of the educational system is inscribed in the consciousness and the body of students, producing both individual and collective practices and patterns of thought that ensure the conformity of practices and their sustainability over time. Internalized cultural capital shapes individuals' self-concept and future achievements (Dumais, 2002). Furthermore, theorists interpret disobedient behaviors as a student's resistance to coercion, symbolic violence, stigmatization, social control, and educational exclusion, as well as the creation of a subculture as a social process of subverting or transforming the dominant discourse (Willis, 1977).

In conclusion, the teachers in our study conceptualized discipline as a tool of orderliness, orienting individuals to conscious compliance with rules. School discipline can affect students' social inclusion and social control. Some also referred to its ideological orientation. School discipline is implemented directly or indirectly, with educational policy and institutions playing essential mediating roles. School discipline and the arbitrary enforcement of the privileged's ideas, values, and norms lead to alienated individuals through symbolic violence and ostensibly democratic education. According to Freire (1977), an alienating education through the symbolic violence of political power enslaves and exploits individuals in favor of the privileged. According to Dewey (1915/2004, 54), the educational process should be a continuous, constructive, and reorganizing transformative experience and an institution that supports building a democratic and cohesive society. Students are not treated as equals but as diverse, and this recognition and respect for diversity is the strength of democratic pedagogy. Freire (2000), on the other hand, is an advocate of a transformative-emancipatory pedagogy since the approach of an oppressive education leads to oppressed citizens. An emancipatory pedagogy highlights the political nature of education, which aims at the prevalence of legitimate knowledge and active

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participation in anti-discriminatory actions, developing democratic ways of thinking, and shaping and empowering skills in school community members (Freire, 2000).

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