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Mapping structural conditions of journalism in Serbia

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Mapping structural conditions of journalism in South Africa

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Executive Summary

Using a multi-dimensional scheme as a conceptual framework, this working paper maps the structural conditions relevant to journalism and conflict communication in Serbia. The report makes use of a broad range of country-specific academic literature, as well as reports compiled by various non-academic organisations active in the media sector.

- 'Structural conditions' are understood as the totality of (formal and informal) orders and structures that characterise media and journalism in a certain space, usually a country.
- Eleven interrelated and interdependent dimensions of structural conditions relevant to media and journalism have been extracted and adapted from existing literature, guiding structured and comprehensive analysis within specific (country) contexts: (1) historical development, (2) political system, (3) political culture, (4) media freedom, (5) level of state control and regulation of media by the state, (6) media ownership and financing, (7) structure of media markets and patterns of information distribution, (8) orientation of media, (9) political/societal activity and parallelism of media, (10) journalism culture, and (11) journalistic professionalism.
- Serbia's structural conditions of journalism developed against the country's political history which over the past three decades has included a communist regime as part of ex-Yugoslavia, followed by an authoritarian/nationalist system ruled by Slobodan Milosevic until his ousting in 2000 following mass demonstrations. With a multi-party system and conflict-free elections, Serbia has been described as a semi-consolidated, electoral democracy albeit with a culture of disconnect between the government and the citizens.
- Serbia's media freedom, constitutionally enshrined and protected by law, has increased steadily, though there was a noted decline in 2012 due to the influence of political and economic elites, which resulted in self-censorship. Journalists and editors are also prone to prosecution under defamation and libel laws.
- A particular challenge for Serbia's media landscape is the saturation of the media market and a constantly fluctuating number of licensed media outlets increasing competition for limited advertising revenue and government funding. There is a lack of transparency in media ownership, with many media owned or controlled by the

government or financial lobbies and advertisers. A coalition of media associations has initiated a strategy which includes plans for the withdrawal of the state from media ownership by 2016.

- Journalists are said to lack familiarity with ethical principles and codes, frequently violating ethical standards; among the greatest challenges to the profession is a decline in the quality of journalism and the dominance of tabloidisation.
- The journalistic field regards education as important for entry into the profession, and many journalists consider it vital to pursue mid-career media training. Salaries are a strain on professionalism causing a decline in public confidence in the media and respect for the profession.

Introduction

This working paper aims to systematically and comprehensively map the structural conditions relevant to journalism and conflict communication in Serbia.

Journalistic performance and journalism culture are informed by various interrelated constituents of journalism – in general, as well as in specific situations such as democratisation conflicts, and in certain countries: these constituents are journalistic work practices, role perceptions, ethical orientations, and, last but not least, the *structural conditions of journalism* (Neverla et al. 2016).

Based on Kleinsteuber (2005, p.275), by *structural conditions* we understand the totality of (formal and informal) orders and structures that characterise media and journalism in a certain space: most commonly, in a country.

These structural conditions are established on four levels: (1) the respective society in general, (2) the media system, (3) the professional field of journalism, and (4) the particular media organisation.

Several dimensions constituting structural conditions of journalism can be extracted and adapted from existing research on structural conditions of media and journalism, which is mostly in the field of comparative studies on media systems (Hallin/Mancini, 2004, 2012; Blum, 2014). These dimensions are listed and described in the table below.¹

¹ For a more in-depth description of dimensions please refer to Lohner, Banjac and Neverla (2016).

Table 1: Structural conditions of journalism: dimensions

Dimension	Description
Historical development: Political stability of country	<ul style="list-style-type: none"> • Changes of political systems / regimes over time and impact on the media system
Political system / form of Government	<ul style="list-style-type: none"> • Formal and informal rules regarding: <ul style="list-style-type: none"> ○ Freedom of people to vote ○ Degrees of division of power (system of checks and balances among the executive, legislative, and judicial branches of government) ○ Institutionalisation of the rule of law and civil liberties
Political culture	<ul style="list-style-type: none"> • Concepts, ideas and structures ruling both the functioning of institutions (media) and agency of political and societal actors as well as citizens: <ul style="list-style-type: none"> ○ Centrality of the state in aspects of society (low state intervention of liberal system vs. high involvement in welfare system) ○ Distribution of political power (majoritarian vs. consensus politics) ○ Relationship between political institutions and the public (individualised vs. organised pluralism) ○ Level of cleavage of political parties and ideologies (polarised vs. moderate vs. fragmented vs. hegemonic pluralism) ○ Adherence to formal rules, procedures and political institutions (rational-legal authority vs. clientelism) ○ Political culture of citizens: how people see the role of the state, treat different ethnicities, religions, linguistic groups, participate in community/political life (voter turnout), the kind of political debates/historical traditions they support
Media freedom	<ul style="list-style-type: none"> • Level of media freedom in legal framework (constitution, media laws and regulation on censorship, information access and control, legal protection of journalistic actors, legal autonomy of regulation bodies) • Policies and actions by state actors or legal bodies
State control / regulation of media	<ul style="list-style-type: none"> • Intention of state control (Political control through organisational, personnel and content-oriented intervention vs. apolitical regulation via distributing frequencies, limiting advertising) • Media types that are being controlled/regulated, addressees of media control • Procedures regarding licensing of media outlets, accreditation of journalists • Character of regulation bodies (state or independent public institutions) • Nature of prosecution of journalists by state actors
Media ownership and financing	<ul style="list-style-type: none"> • Whether media owned by private companies and/or the public or state • Market driven media, mixed-source financing and state financing

Structure of media markets and patterns of information distribution	<ul style="list-style-type: none"> • Audience and market share of different media types • Size of media market / Level of internationalisation • (De-)centralisation of media market / system • Pluralism / concentration of ownership • Patterns of media distribution and circulation of information
Orientation of media	<ul style="list-style-type: none"> • Primary social focus that guides news production: commerce/market oriented, divergent, society oriented
Political / societal activity and parallelism of media	<ul style="list-style-type: none"> • Tendency of media to intervene in political debate / engage in advocacy / influence political events • Alignment between media outlets/individual journalists and political parties and societal actors (religious institutions, trade unions, business) • Polarisation of the public/audiences according to the political orientation of media which they consume
Journalism Culture	<ul style="list-style-type: none"> • Overall status of journalism and role perception of journalists in relation to other social systems: investigative/critical, ambivalent, or rather concordant to those in power
Journalistic Professionalism	<ul style="list-style-type: none"> • Internal rules and norms of the professional field and media institutions <ul style="list-style-type: none"> ○ Level of professional education/training ○ Level of professional organisation ○ System of self-regulation ○ Awareness of professional norms and practices ○ Prestige/competitiveness of journalistic profession

It is important to keep in mind that, while structures are often referred to as something static or 'given', they are established by different *actors* and always subject to *changes* (Hallin and Mancini 2012b, pp.302–303). Obviously, this particularly applies to countries in transition. Thus, agency and the procedural dimension are also an important focus of analysis when the structural dimensions of journalism are being investigated.

Presently, based on the developed scheme of dimensions we will provide a systematic and critical analysis of the structural conditions of media and journalism in Serbia. The report builds on country-specific literature that touches on subjects raised within each of the dimensions, aiming at a comprehensive overview of the structural conditions of media and journalism in the country.

Additionally, using country-specific literature should enable us to identify additional structural conditions specific to the Serbian context.

Limitations in the availability of research and current facts and figures have resulted, however, in differing levels of detail in reporting certain dimensions. Due to the focus of existing literature this paper will focus on the structural conditions concerning (1) the respective society in general, (2) the media system, and (3) the professional field of journalism. Structural conditions at level 4 (particular media organisation) will be treated in detail in the MeCoDEM interviews with journalists reporting on democratisation conflicts.

Moreover, it has to be noted that the editorial deadline of this working paper was in April 2015 and therefore subsequent publications relating to structural conditions of journalism in Serbia cannot be reflected here.

Country report: Current structural conditions of journalism in Serbia²

Key to understanding Serbia's³ democratic transition is the country's **historical development**, marked by a series of wars of independence against the Ottoman Empire in the 1800s and 1900s, followed by unification of Serbia and other republics into a communist Yugoslav state in 1945 after World War Two, a development that stemmed out of a communist led liberation movement. Serbia's transformation therefore also needs to be understood in the context of a socially, economically and institutionally communist historical set up. With its leader, Josip Broz Tito, at the helm, **Yugoslavia's political system** was "an authoritarian regime with limited societal pluralism, in which power was divided between the constituent republics and federal government" (Zakošek 2008, p.590). After Tito's death in 1980, communist leaders considered it critical to preserve the political status quo, and in so delayed imminent reform. Yugoslavia's socialist market economy had been suffering economic deficits, resulting in differences among the republics' levels of development, and in conflicts over access to investment capital. Growing dissatisfaction made it clear that reform needed to happen. Three different reform paths were proposed (by various republics and at a federal level), one of which was advocated by Milosevic and the Serbian Communist leadership and characterised by populist, nationalist mobilisation, which according to Zakošek (2008) set the country's subsequent democratic transformation apart from that of the other republics (for further information on various reform proposals refer to Zakošek 2008, pp.591–592).

Yugoslavia began to disintegrate against the backdrop of the fall of communism and a slow brewing of nationalist conflicts between 1989 and 1990. **Multiparty elections** took place within the different republics and new party systems were established, facilitating the breakup of Yugoslavia. Serbia's elections (although considered unfair) produced the country's new leader and head of the **Socialist Party**

² We thank our colleagues Nebojsa Vladislavljević, Filip Ejduš, Aleksandra Krstić and Ana Stojiljković for their valuable contribution to this report.

³ An important point about the ethno-national composition of Serbia (population around 7.2 million) is that it is comprised of many minority groups and 37 ethnic groups, primarily Hungarians, Bosniaks and Roma (Marko 2013, Krstić 2014 and Surćulija et al. 2011). The largest minority group in Serbia is Hungarian at 3.5 per cent, while the largest portion of the population is Serb at 83.3 per cent (CIA 2015).

of Serbia (SPS), Slobodan Milosevic. By 1991, the SPS had a membership of 350,000, in contrast to 60,000 loyal to the opposition party, the Serbian Renewal Movement (SPO). With access to the old regime's organisational resources and control over print and electronic media, the ruling party was able to maintain power by portraying the opposition as "corrupt and quarrelling traitors of the nation" (Vladislavjević 2014, p.6) and excluding them from accessing media, while simultaneously depicting themselves as "patriotic, moderate and experienced" (*ibid.* p.6). (See also Gordy 1999 on Milosevic's success in sustaining a regime on the exclusion of alternative politics, media and culture.) Vladislavjević (*ibid.* 2014) chronicles the numerous **protests and demonstrations throughout the 1990s**, which eventually led to Milosevic's ousting.

The first of many mobilisations happened in March 1991, when thousands protested against the anti-opposition media propaganda, to which Milosevic reacted by jailing the opposition leader and banning the broadcasting of two independent TV and radio stations (a ban that was lifted in 2000, following another four-day student march). A second set of demonstrations and protests took place in 1992 with the creation of a federal constitution without consulting opposition parties and the announcement of federal party elections. At this point a coalition of various opposition parties (albeit otherwise fragmented and hostile) was formed (the Democratic Movement of Serbia), calling for resistance and a boycott of the elections, which resulted in a week-long demonstration by 100,000 participant. Although these protests did not result in the overthrowing of Milosevic's rule, these campaigns did have the effect of dividing the country into two strong political forces – the regime, and a democratic opposition, now united and with a broader focus on the anti-authoritarian struggle (*ibid.* 2014). In 1996, the opposition coalition 'Zajedno' ('Together'), won the local elections – a victory which the regime tried to annul through election fraud, resulting in further demonstrations and the eventual reinstatement of the opposition's victory and its control over Belgrade and other cities. It was at this time that privately-owned media outlet BK TV moved their support from the regime to the opposition. Over the next few years, Milosevic's original electoral popularity of the early 1990s transformed into a leadership maintained through "personalist and arbitrary rule" with a weakening connection to society (contributing to this was independent media's exposure of his family's excessive lifestyle while Serbia's citizens were struggling)

(*ibid.* p.9). Another set of protests with over 100,000 participants occurred in 1999, but once again failed in overthrowing Milosevic's regime, primarily because the protests happened so soon after the conflict over Kosovo's independence⁴ and NATO's bombing, a series of events which consolidated Milosevic's power at the time. Milosevic's regime collapsed following the September 2000 presidential elections which were won by the opposition candidate Vojislav Kostunica. This time the opposition coalition was supported by international funding, NGOs and opposition media (independent from Milosevic's regime) who mobilised the public to vote, along with peaceful student resistance. Milosevic refused to leave office, resulting in a march on the Federal Assembly building in October which led to the "collapse of the regime's power structure" (*ibid.* p.11). (For further insight into Serbia's recent political history see Vladislavljević 2008, Lenard 2001, Cohen 2001). Observing the ***post-Milosevic political period***, during which President Vojislav Kostunica was in power, and the Prime Minister Zoran Djindjic was assassinated, Gordy (2004) highlights some of the dimensions and opportunities these events presented for democratic transition, and reasons why they were unsuccessful. During the early 2000s calls for democratic transition were fostered, with Kostunica advocating a 'soft' or gradual transition, and Djindjic proposing a 'hard' or rapid approach to democratisation – a disagreement which reflected those between supporters of Milosevic's regime and the opposition. Djindjic's assassination, Gordy (2004) argues, mobilised a realignment in the public's support for a 'hard' transition, based on a growing perception that advocates of a 'soft' transition were merely following in the footsteps of the old regime and purposely slowing down transformation. Despite this momentary shift in popular orientation, Gordy (*ibid.* p.16) suggests that its failure to become an ongoing and solid transition can be put down to an unwillingness of the "Serbian political elite to demolish its own opportunities and devalue its own political capital".

Both Zakošek (2008) and Ramet (2011) explore some of the factors and dimensions which could explain Serbia's post-Yugoslav transformation in contrast to other republics (namely Croatia). Zakošek (2008) looks at the relationship between state-building, democratisation and war, and whether or how these processes played

⁴ For further historical context see Zakošek (2008, pp.590-591).

an interconnected role in Serbia's (and also Croatia's) road to democratic consolidation, and suggests that even though both countries were affected by war, in Serbia's case state-building was attempted through nationalist mobilisation, which resulted in the development of authoritarian rule and slowed down the process of democratisation. Additional factors were Serbia's polarised party system and a low level of institutionalisation. According to Zakošek (2008), four specific factors defined Serbia's regime change: the communist elite, captured by Milosevic's political party (the SPS which was communist in ideology in terms of wanting to retain state ownership while incorporating nationalist ideology); the nationalist movement; the centrist opposition (a coalition of parties which in essence were also proponents of nationalism but pro-democratic, and a set of marginal parties that fundamentally opposed the regime and the war); and lastly, the army of Yugoslavia under Milosevic's control (*ibid.* pp.595–596)⁵. Ramet (2011) contributes a further three dimensions to consider when analysing Serbia's and Croatia's divergent paths to democratisation – the countries' political corruption and criminalisation, structural and institutional composition, and political culture manifested through history books and media (propaganda) - stressing that the biggest differences between the two countries occurred within the second and third dimensions. Of particular interest is Ramet's consideration of the countries' textbook accounts of history, and the continued inaccuracies noted in the portrayal of Serbia's history, stressing that "historical revisionism is dangerous for the democratic potential of Serbian society" (Ramet 2011, p.283). Ramet adds, "Political culture sets the limits of what the citizens of a country can imagine for their future, and the limits of imagination have much to do with the limits of political evolution" (*ibid.* p.283).

Stojilković (2012) provides further analysis of the extent of Serbia's success in the process of democratic transition over the past two decades. Reflecting on Huntington's (2004) concept of consolidation, and Linz and Stepan's (1998) five indicators of democratic development, Stojilković suggests three criteria for measuring democratic development and a further three for evaluating the democratic health in

⁵ For further perspective see Vujačić (2004) who examines and illustrates some of the political-cultural factors which defined the conflict-driven nature of Serbia's separation from Yugoslavia, in contrast to the simultaneous and relatively conflict-free breakup of other multinational states such as USSR and Czechoslovakia.

Serbia. The first development criterion should be the presence of a multi-party political system, which, Stojiljković (2012, p.9) argues, is present in Serbia, classifying it as an “electoral democracy” and which, although not perfect (due to weak electoral administration) is free of post-election conflicts (see also Pavlović and Antonić 2007 for discussion on electoral processes in Serbia). The second criterion measures governments’ levels of responsibility to their citizens and voters (kept in check by the risk of losing power in subsequent elections), and here Stojiljković (2012) observes a disconnect in effective communication between Serbia’s civil society and government. The third indicator refers to **political culture** – a strong citizen participation defined by an active civil society as well as politically engaged and literate citizenry, which Stojiljković argues continues to be weak because of an absence of a culture of democracy (see also Kirbiš 2013 on political participation and political culture in post-communist countries, including ex-Yugoslav states). Citing Zoran Djindjic⁶, Stojiljković says:

If in addition to the project and institutions, the third part does not occur, if democracy does not become culture, if in the value system of a society there is not the norm that democracy is lived as a form of everyday life, then institutions are worth very little and democracy will depend on the balance between political powers, and not the will and consensus in the society itself (2012, p.10).

The development of this final indicator, it seems, most closely informs the evaluation of the “health” of democracy across the further three indicators as argued by Stojiljković: the first of these speaks to “democratic sentiment” or the attitude and level of citizens’ trust in the values and effects of democracy; the second refers to a “dominant legitimacy formula” of a **political system** or regime demonstrating a clear strategy for the development of the country, in Serbia’s case, importantly, that of democratisation; the third indicator evaluates the legitimacy of electing people to power (Stojiljković 2012, p.11). Based on the above indicators, Stojiljković concludes that Serbia remains a “semi-consolidated, ‘lacking’ or ‘defective’ democracy” – an assessment also observed in European Commission reports (*ibid.* p.13; for an

⁶ Prime Minister of Serbia from 2001 until his assassination in 2003.

overview of Serbia's democratic development in relation to EU standards see Orlović 2008). It is worth noting at this point Vladisavljević's (2011) assessment of Serbia's democratic development and his argument that the concept of consolidated democracies creates unrealistic expectations and may not be the best concept against which to measure democratic progress or success. Instead, he calls for typologies which would allow for the analysis of democratic development to take into consideration its different stages and progressions (as a process of transition from one type of democracy to another) by focusing on the positive traits which a transition has achieved (and therefore avoiding perpetual disappointment). Within broader procedural definitions of democracy, Vladisavljević (2011) suggests that Serbia could be considered a democratic country, in so far that elections are free (of election fraud and threats to voters, there are no limits to political campaigning, or repression of access to media); freedom of speech and media has been significantly improved, and is equal to that in neighbouring countries (Croatia or Bulgaria) which are EU member countries; and lastly, despite suggestions that the Milosevic era security apparatus has managed to maintain its power, this does not necessarily support the argument that Serbia is undemocratic, but rather that this particular domain has remained unreformed and that subsequent democratic elites have continued to rely on these structures in the same way as previous socialist elites.

In these terms, Serbia has met several key principles of democracy, though further improvement is necessary, such as ensuring that political powers respect constitutional and legal procedures. Pressures imposed on Serbia's political leaders to conform to EU standards of democratic transition are often misaligned with those that are most immediately relevant to Serbia and reflective of standards outlined in democracy literature, while on the other hand, changes most pressing to Serbia are often not prioritised by the EU (Vladisavljević 2011).

It is with this overview of Serbia's political history in mind that we now move on to discuss the country's **media**. As mentioned above, Milosevic's regime controlled much of the media space in the 1990s. The rise of nationalism empowered a regime, allowing the ruling political party to misuse and control the media by appointing editors and directors loyal to the party, adopting undemocratic media laws and using the media space for propaganda. The media was divided into state-owned and controlled media

(supportive of the regime) and independent (or opposition) media which tended to align with the political and anti-regime opposition (and were mainly supported and funded by international donors). The state broadcaster *RTS*, and the newspaper called *Politika* were under the control of the regime. It was during this time that international donors started supporting the development of independent media, to counteract the regime-aligned media. Even within the independent media camp, there were divisions between those who were oppositional to the extent that they aligned with the political opposition, and those who were independent in the sense that they claimed to practice professional and unbiased journalism. It was the opposition media with international assistance⁷ that sustained the revolution which led to the downfall of Milosevic and the regime, and with this political change the division between the media camps narrowed too. Nevertheless, by slowing down the transition process, creating media laws that lacked long term vision and strategy for change, or preventing the adoption of some laws, media development and freedom continued (and still continues) to be suppressed and misused by politicians, the business elite and the judiciary. (Marko 2013)

According to the IREX (2013) Media Sustainability Index, discussions with Serbian media professionals⁸ reveal that **media freedom** and freedom of speech has stagnated, and although levels of media freedom increased between 2000 and 2012,

⁷ Throughout the 1990s and 2000s, international media assistance organizations have played a significant role in the development of the Serbian media system, including assistance in “the adoption of an adequate legal framework, the establishment of regulatory bodies and practices, the transformation of the state TV into a public service broadcaster, and the empowerment of journalists and media managers to cope within the market conditions” (Marko 2013, p.10). Based on his analysis of foreign donor assistance to the Serbian media (focusing on the Republic Broadcasting Agency, public broadcaster *RTS* and private TV station B92), Marko (2013) concludes that three forms of assistance efforts characterized the development of media during the 1990s and 2000s: vital support, which was concerned with helping independent media survive, support for political change, and lastly, support for building a long-term sustainable media. The problem with the first two approaches was that they lacked long-term vision for a sustainable media environment, and instead created dependency of media on external support for survival, and once the political changes of the late 1990s occurred, funding was often withdrawn and some of the media dwindled or disappeared. Following democratic changes, support received from the EU through technical or financial assistance, as well as expertise and consultancy, or training of journalists in professional and journalistic skills, was characterised by a long-term strategy. Foreign assistance failed largely because the enormous importance of “economic sustainability” to the media was not recognised during the 1990s (Marko 2013, p.50; for details on how each of the three analysed media were supported and the outcomes of that support see Marko 2013, p.20).

⁸ These consist of a panel of local experts – reporters, editors, media managers or owners, professors and human rights professionals – selected from diverse media outlets, NGOs or academic institutions throughout Serbia.

the 2013 report notes a decline in 2012. Journalists are influenced by political pressure, which leads to high self-censorship and editors reluctant to criticise political figures and officials: media professionals and participants in the study agreed that “widespread self-censorship is obviously returning the media sector to conditions similar to the 1990s” (IREX 2013, p.122). Although media freedom is constitutionally enshrined and protected, and laws such as the Broadcasting Act and the Public Information Act are in line with European standards and provide a foundation for media development, Milivojević (2012) observes that the presence of inadequate laws and a saturated media market continues to pose challenges for media practitioners, namely limitations on media freedom through the influence of powerful elites (political and economic, and state institutions) as well as courts where journalists are often charged with defamation and slander (Milivojević et al. 2012).

Lawsuits are filed against journalists, most often by police, judges, politicians and businessmen and laws are not applied correctly by local court judges, or are misinterpreted because judges remain unaware of legal standards (for example defamation law, or libel law, which remains criminalised). The gap between legal provision and the actual practice of media freedom is widening. Local judges are also likely to be influenced by pressure from politicians or interest groups, and succumb out of fear of placing themselves in danger. Crimes against journalists in Serbia include assaults, threats or having their cars burned; these crimes are not prosecuted because the police and judiciary often do not get involved (IREX 2013; see also Janković et al. 2009). The combination of political pressure, physical threats and attacks, and limited legal protection has had the effect of restricting investigative reporting (also compounded by financial pressure, discussed later). Journalists and media outlets are often banned from press conferences (or simply not invited) depending on their reporting reputation or relationship with the political elite, or are denied scoops on exclusive stories (IREX 2013).

Through a series of interviews and focus groups with journalists, editors and managers and media owners in Serbia, Milojević and Ugrinić (2011) explored the level of media freedom by relying on three indicators: the effect of political and economic pressure on the work of journalists, market conditions (expanded on later) and professional community standards (also discussed further on in the paper). The study

finds that the media and its professionals still cannot be seen as practicing in an environment conducive to democracy building, evident in the overall politicisation of the media system, pressure exerted by political and economic parallelism, dominance of tabloidisation and sensational media, and a lack of professional journalistic identity (expanded upon further on in the paper, see Milojević and Ugrinić 2011).

As highlighted earlier (see footnote²) international media assistance organisations and donors played an extensive role in Serbia during the 1990s and 2000s in supporting the development and strengthening of independent media. While much of this funding had initially been directed at opposition media with a view to providing alternative voices in support of political resistance to the regime, post-2000 it was being redirected towards the **transformation of Serbia's state broadcaster**, 'Radio Televizija Srbija' (Radio-Television Serbia, RTS) into a public service broadcaster (PSB). Thompson (2013) looks at the development of PSBs in several ex-Yugoslav states, including Serbia, where the development of a functioning PSB was part of the country's engagement with the EU and the process of EU membership (Serbia became an EU candidate country in 2012). Serbia's state broadcaster RTS became a PSB in 2006, and at that point split into two services, one for Serbia and the other for the province of Vojvodina (Thompson 2013, p.10). According to the new Public Media Services Act, adopted in 2014, RTS is financed through the state budget and will continue to be until 2016, when subscription fees will become obligatory again.

During the transition process, international assistance included "external audits, technical assistance, training in journalism and management, various kinds of expertise, sales and marketing" (*ibid.* pp.15–16). A series of surveys and interviews conducted by Knežević (2012) with participants in later journalism training (in this case by the BBC) at the RTS, revealed that attendees found it beneficial. The training program was part of broader media reform aiming to strengthen the professional capacity of journalists and improve technological capacity and programming diversity, thereby improving the media's democratic performance and the country's partnership with the EU (*ibid.*, 2012, see also Matić 2012 for an overview of Serbia's state of media freedom in relation to EU standards). While there is limited insight into whether RTS content fulfils its public service mandate, it is "widely considered to have the best quality news of any Serbian television station" with a high level of public trust

(Thompson 2013, p.16). Funding remains a challenge due to a weak advertising market and low monthly licence fees. Although the broadcaster is legally independent, its independence from interference by political or business powers cannot be confirmed. According to Matic (2012) the Public Broadcasting Agency has monitored the public broadcaster's performance in terms of "commercial advertising restrictions, [...] special programming obligations [and] code of conduct"; however, no assessments have been made of the broadcaster's level of independence (*ibid.*, 2012, p.62). Matic (*ibid.*, p.62) explains that media legislation at the time of writing did not feature mechanisms "to account for fulfilment of what they [RTS] have been mandated to achieve, including programming production independent of political influence". Protection from political interference is insured through independent editorial policy and management as well as independent financing through subscriptions and advertising; however, these have been inadequate to ensure financial stability, while a lack of transparency regarding the broadcaster's sources of funding raises suspicions that RTS is "susceptible to external influences" (*ibid.* p.62).

Serbia has a **dual broadcasting system** consisting of public service broadcasters and private electronic media (radio and television) – and an **independent regulatory body**, the Republic Broadcasting Agency (RBA) (Marko 2013). According to *Glas Srbije (Voice of Serbia)*, the RBA changed its name to 'Regulatory Body of Electronic Media' in August 2014 (Glas Srbije 2014), in accordance with the newly adopted Electronic Communications Act. The RBA is responsible for the distribution of broadcast licenses and the monitoring of media content to ensure programming compliance, but is seen as lacking transparency and underperforming its mandated responsibilities (in spite of evidence that it is well funded and sufficiently resourced). It is also suspected of not being truly independent of political and economic pressures, evident in a lack of transparency when it comes to decision-making processes and criteria on broadcasting licence distribution and refusal to make licensing debt data publicly available. For example, the agency took licences away from some TV stations who owed licence fees, but wrote off the debts of others (IREX 2013).

In 2011, a '**Strategy for the Development of the Public Information System in Serbia**' to the year 2016 was initiated by a coalition of media associations, outlining a five year plan which includes the withdrawal of the state from media ownership (Krstić

2014; Milivojević et al. 2012 and Marko 2013). The new media strategy's vision aims to address issues such as: "amendment of new media legislation, privatization of state owned media, new rules on state aid, and transparency of media ownership" (Surćulija et al. 2011, p.8). Krstić (2014, p.240) points out that until the time that this strategy is fully implemented, private broadcasters will continue to compete with state-owned broadcasters, which "operate under much favourable conditions" such as for example being exempt from paying broadcasting taxes to the RBA and the Serbian Authors' Music Organisation. It is important to note the process of switchover from analogue to digital which was originally set to take place in 2012, but due to various challenges has been rescheduled for mid-2015. Krstić (2014) argues that the delay can be attributed to political and legal inconsistencies as well as financial challenges faced by broadcasters, the complex media ownership landscape and lack of public awareness of digital switchover requirements. One of the first obstacles is the complexity of Serbia's media market, and outdated regulatory laws that did not account for digital and technological shifts in the media but are also required to put "order into the media market" (*ibid.* p.243).

Following the end of Milosevic's regime, three major **media regulation laws** were passed – the Broadcasting Act, the Public Information Act, and the Telecommunications Act (as well as the Strategy for the Development of Telecommunication in Serbia from 2006 to 2010). These laws were created by media and legal experts as well as EU representatives, and envisioned various strategies which would ensure the transformation of the media system in Serbia (Đoković 2004, p.10; Veljanovski 2012). The aim of the Public Information Act was to promote the protection of sources, media freedom of journalists and public communications participants, while The Broadcasting Act would regulate the broadcasting system and establish a public broadcasting system and independent regulatory bodies (Milivojević et al. 2012). Krstić (2014) highlights some of the limitations of these laws in the digital switchover process: the Strategy for Development of Telecommunications stresses digital broadcasting as a main goal but does not provide details of the process; the Broadcasting Act⁹ was created for the purpose of regulating electronic media in the

⁹ Veljanovski (2012) observes that at the time of its establishment the Broadcasting Act did not take into account or adequately predict some of the limitations (and necessary solutions) which would emerge in light of digital and

analogue environment; the Public Information Act, does not deal with digital broadcasting; and the Telecommunications Act does touch on the issue, but briefly (Krstić 2014). The adoption of the Electronic Communications Law, which provides a regulatory framework for media that minimises political influence on spectrum allocation, was a step in the right direction (Krstić 2014). Delays can also be attributed to political circumstances between 2006 and 2014, during which period several elections took place also resulting in changes in the jurisdiction responsible for digitisation. Likewise, Krstić (2014) notes that the high cost of the digital switchover, for both broadcasters and government, has been another obstacle, as has the weak campaign to inform citizens and consumers about the switchover process and its benefits. Surćulija et al. (2011) add that subsidy schemes which would allow households to purchase digital television sets and decoders were not implemented.

Serbia's **media market** is saturated, the majority of TV stations are commercial and privately owned and approximately 70 TV stations are owned by local governments (Krstić 2014). According to Surćulija et al. (2011, p.7), **media ownership** lacks transparency, and points out that there is no "publicly available register of media owners". Several media outlets continue to be owned and controlled by the state or local governments, while at the same time, commercial media ownership lacks transparency, and is often controlled by financial lobbies and advertisers (for a breakdown of ownership of several media outlets in Serbia in 2004 see Đoković 2004). The high media saturation has increased competition for the limited advertising revenue (Milivojević et al. 2012). Additionally, the financial crisis had a negative effect on the media market; during the crisis over 50 print media outlets were closed, foreign media companies left the Serbian market and commercial stations stopped broadcasting because they could no longer afford to pay broadcasting taxes to the RBA (Krstić 2014). Advertising revenue in 2010 was EUR175 million, of which EUR98

technological shifts in the media. A lack of adherence to the law and establishment of contradictory laws resulted in the slowing down of the transformation and finally a call for a re-evaluation of the existing law. Changes to the Broadcasting Act were mandated to be made in 2007 but those tasked with the responsibility realised that it was no longer sufficient to make amendments, but rather to create a new Electronic Media law. In line with European broadcast media standards, some of the changes outlined in the new law include a clear separation between the providers of programming (radio, television and online media) and providers of broadcast satellite/cable networks. Another important provision of the new law is the introduction of an electronic media agency, whose elected members would be diverse and representative of a variety of groups including civil society and human rights groups, creative industries (film, theatre and music) and national minority groups (Veljanovski 2012).

million went to television media, EUR42 million to print outlets, EUR8 million towards radio and EUR6.5 million to internet-based media. Such relatively limited access to financial support makes media arguably “vulnerable and easy to manipulate by the state” especially where EUR15 million of this advertising revenue came directly from the state (Marko 2013, p.16, see also BIRN 2012). This level of competition, financial vulnerability and active monetary support by the state arguably pressure the media to produce “positive coverage of the incumbent politicians and parties” (Marko 2013, p.16). Overall financial sustainability of media was at its worst in 2012 with a continued decline (IREX 2013). On a positive note, Surćulija et al. (2011) write that telecommunication operators are among the largest advertisers in the market; however, it seems that they have not taken advantage of their position to exert pressure on the media.

The Balkan Investigative Reporting Network’s (BIRN) (2012) overview of the ***distribution of government funding*** among broadcasters in Serbia highlights the need for these channels of allocation to be transparent in order to maintain fair competition and neutrality in budget distribution across the media market, ensure editorial autonomy, and that funding supports the production of programming content (as opposed to human resource costs). Among the channels of financial support are the Ministry of Culture and Information, various other ministries, the secretariat for culture and public information pertaining to national minorities, local government bodies, and public companies. Although consolidated figures are difficult to obtain, according to BIRN (2012), state budget funding contributed 15 per cent to the entire Serbian media market. A total of 159 media institutions receive state funding, and among those, electronic media (TV and radio) are the biggest, followed by print media (for a detailed breakdown of financial distribution according to media type, ownership type, regions/cities, etc. see BIRN 2012). The state bodies rely on different methods/models of financial allocation to media institutions, and the report highlights that the absence of standardisation across distribution practices results in a lack of transparency. Media institutions are funded through four major models: subsidies; direct contracts; competition for the improvement of public information; and public procurement (for further breakdown of subcategories of each model see BIRN 2012, pp.17–32). Some media institutions in receipt of state funding are obliged to deliver reports (depending on type of funding model/relationship with government) outlining

expenditure – an obligation which is often not fulfilled. In analysing the institutions' financial reports submitted to the study, BIRN (2012) concludes that funding is primarily spent on human resources and operational costs, instead of programming content as intended. In her report "Hidden Control", Matic (2013) explains that state financing mechanisms and their preferential and non-transparent funding methods are having the effect of subtle and indirect censorship and control, by affording those in power and their activities positive media portrayals (and by penalising, by the withdrawal of financial support, those who publish critical coverage). Matic (2013, p.6), who argues that the Serbian media system has not much improved since 2000, stresses that the current ownership and financing situation is "seriously distorting free market competition and obstructing the development of free, independent and plural media". In-depth interviews of journalists in Serbia, by Milojević and Vobič (2014), found that journalists felt increased responsibility to those in power (politicians and media owners) as opposed to the public (based on normative definitions, see Milojević and Vobič 2014). In considering the Hallin and Mancini's media systems dimensions, Marko (2013) draws comparisons between Serbia's media system to that of the **polarized pluralist model**, as characterised by political parallelism, a strong role of the state in the media, and a weak development of the rational legal authority. The media landscape is externally pluralised and reflective of a political and ethnically diverse society. Krstić (2014) adds that Serbia's media system shares many characteristics of the Mediterranean media system, as recognized by Hallin and Mancini (2004) and Papathanassopoulos (2007): a "tradition of advocacy reporting, politicization of public broadcasting and broadcast regulation, as well as limited development of journalism as an autonomous profession" (Krstić 2014).

The number of **licensed media outlets** on the Serbian market is constantly fluctuating. Compared to the start of the 2000s, when over 1000 electronic media outlets were in existence, Milivojević et al. (2012) write that in 2012 there were 500 print media, 186 radio stations, 96 TV channels and 90 online publications, while Marko (2013) reports there were 173 TV and 186 licensed radio stations in 2013 – numbers which indicate a high ratio of media per capita. Consulting the Republic Broadcasting Agency and the Business Register Agency as sources, IREX (2013) breaks the media market down as follows: print, 591 outlets (including 20 dailies, 94 weeklies, 43 bi-weeklies, and 224 monthlies); radio stations, 214 radio stations (2 public service + 4

national coverage, 48 regional, 267 local); television stations, 111 on air, 134 licensed (2 public service, 4 national, 30 regional, and 98 local, plus 39 cable stations); internet, 107 news and information sites (IREX 2013).

Print media circulation is low and **television is the most popular medium** and the dominant form of public communication in Serbia, with almost all households owning a television set resulting in a 77 per cent audience concentration across major TV channels (Surćulija et al. 2011; Milivojević et al. 2012). Commercial channels are observed to lack programming diversity and the most popular and successful content tends to be sensational in nature, while investigative reporting is dwindling (Milivojević et al. 2012). Digital migration has led to a decrease in print sales; however, those newspapers that have migrated online have seen a rise in online visits. Growing segments of the population in Serbia are accessing online news, and media outlets are investing more in transferring their content online (Surćulija et al. 2011). With the help of social media, news outreach has expanded, however due to low income and a great digital divide between rural and urban internet access, many continue to rely on traditional media (IREX 2013). At the end of 2009, almost a quarter of the Serbian population (7.2 million) had internet access (increasing to over 40 per cent by 2012) with greatest consumption being among the youth aged 12 to 29 (Surćulija et al. 2011; Milivojevic et al. 2012). According to Krstić (2014), 43.4 per cent of households in Serbia had internet access in 2013. With digital migration likely to continue growing, Šijan (2013) emphasises the need for Serbian media to better utilise the internet and social media, not only to improve the distribution of information and programming to its audiences, but also to boost targeted advertising, and therefore financial sustainability. She suggests Serbian media need to shift away from broadcasting towards narrowcasting, by producing programming which targets specific audiences, and therefore advertisers (Šijan 2013). According to IREX (2013) media are willing to report on social issues such as gender, sexual orientation, ethnicity and religion, but often these topics are reported on in the context of accidents or extreme events. There has also been a drop in cultural and educational programming, though there are efforts by RTV Vojvodina to increase programming on issues affecting minorities (IREX 2013).

In 2012, the Serbian media industry had approximately 4000 active media professionals. Journalists regard education as an important condition for entry into their

professional field. Just over 70 per cent of journalists surveyed in one study claimed to have **formal education**,¹⁰ (Milivojević 2011) and many consider it vital to continue attending mid-career development media training which is often offered by international organisations (Milivojević et al. 2012). Throughout the 2000s professional media associations were important, but remained ideologically divided (in continuation of political division during the regime). Nevertheless, in 2010 five different associations formed a media coalition aiming to draft the Strategy for the Development of the Public Information System in Serbia (Marko 2013).

The **Ethical Code**, created in 2006, outlined professional values such as objectivity, independence, protection of sources and so on; however, these values are often violated, and most frequently by tabloids which frequently discredit or campaign against particular people or organisations (Marko 2013). The **Press Council** was established in 2010 to monitor media adherence to the Ethical Code and deal with complaints in relation to violations of the code (Marko 2013). According to a study by Milivojević based on surveys and focus group interviews with Serbian journalists, less than 2 per cent of journalists are familiar with and adhere to the principles of the ethical code and some of the biggest problems facing media are a lack of journalistic quality and the dominance of tabloid journalism (Milivojević 2011). Tabloid media content is populated by stories on criminal arrests and charges, used to discredit public officials. In a race to break stories and report scoops, journalists are failing to check facts and information before publishing, and often do not adhere to ethical codes. Some are even believed to intentionally commit ethical violations to attract public attention and increase sales (IREX 2013).

Digitisation has allowed journalists greater access to diverse sources and information (Surćulija et al. 2011). However, access to technological resources varies greatly and there can be vast contrasts between outlets, some of which rely on outdated forms of communication (Milivojević et al. 2012). Although digitisation has technically given journalists greater opportunity to carry out investigative journalism,

¹⁰ 'Formal education' refers to a completed university degree. Of the 73 per cent surveyed journalists, 32 per cent completed a degree in journalism studies, 35 per cent in social sciences and humanities, and 6 per cent in technical and natural sciences.

they remain hindered by political and economic pressures. In addition to that, increased demand for information by the public, has forced journalists to practice “Google journalism”, a trend allowing journalists to quickly recycle internet content into news media products (Surćulija et al. 2011, p.7). IREX also notes that due to the high cost of news production, media outlets rely on the internet and a variety of other free sources, to illegally download programs (IREX 2013). **Low salaries** are also putting a strain on professionalism. In 2012, the average salary at a local media outlet was EUR250 per month and salaries are often up to four to seven months late (IREX 2013). In 2011, journalists stressed that ‘bad salaries’ are the biggest problem facing their profession, with only a quarter of those surveyed earning more than RSD50,000 (Serbian dinars) per month, which at current exchange rates equates to just over EUR400 (Milivojević 2011). As a result of the decline in professionalism, “the public’s confidence in the media is becoming undermined and journalists are not seen as members of a respected profession” (IREX 2013, p.122). Journalists consider low professional status and social reputation to be the third biggest threat to their profession (Milivojević 2011). Also important to mention here are debates on the role of citizen journalism within traditional journalism. Here, Krstić (2011) explores the relationship between the two and their meaning for free expression within a democratic society, while considering traditional indicators of journalistic professionalism such as editorial obligations, regulation and transparency. Based on a literature review, the monitoring of online content and interviews with professional and citizen journalists, Krstić finds that citizen journalism cannot be seen to interfere or jeopardise journalistic norms, if it is perceived as an opportunity for participating citizen journalists to collect, exchange and distribute information, as opposed to perform journalism (Krstić 2011, see also Bogdanović 2013).

Conclusions

To sum up, against the historical background of a communist legacy and the nationalist ideological conflicts of the 1990s the structural conditions of journalism in Serbia are characterised by political institutions in the process of democratisation, and a media system which shows both state influence and market-driven constraints. Thus, structural conditions indicate an increasing institutionalisation of professional and independent journalism, as well as a fragile and ambivalent status in many respects. Media and journalism seem not to push but are rather in line with the ongoing democratisation process.

More specifically, media freedom is constitutionally and legally protected; however, the increasing influence of political and economic elites has led to self-censorship and a decline in media freedom since 2012. This has been attributed to some extent to a saturated media market and opaque media ownership structures controlled by government or financial lobbies, as well as unclear sources of funding and competition for limited advertising revenue. Journalists also face the risk of lawsuits under defamation or libel laws. Similarly, in spite of the existence of ethical codes and a press council, journalists have been found to lack familiarity with ethical principles, and those working in tabloid media are said to violate ethical standards most often, with a noted decline in the overall quality of journalism. This coupled with journalists' low salaries is putting a strain on the profession, resulting in a decline in the public's confidence in media and respect for the profession.

In general, the developed list/scheme of dimensions has proven its validity, as it seems to guide the analysis towards the central factors of structural conditions relevant to media and journalism in Serbia. However, obviously, the relative influence of the dimensions varies. Moreover, the implication of the internet and social media on structural conditions of journalism have so far not been systematically considered in (theoretical) literature on media systems.

The country-specific analysis of structural conditions has proven its validity in that the central structural factors of the political, economic and legal frameworks in Serbia are established on the level of the *nation-state*. However, the report has also

identified transnational influences, such as foreign media ownership, the European Union and international media assistance organisations. Therefore, although the nation-state still seems to be the central unit of analysis at the beginning of the 21st century, the transnational level should be an additional frame of investigation.

The report also demonstrates the importance of *conflict communication* as case study with regard to structural conditions: in fact, conflicts (and communication about them) can be considered as test cases for the functioning of media-related structures, and hence serve as possible catalysts for changes to these structures. The country report has confirmed the need to consider *agency* and the *procedural dimension* while investigating structural conditions of media and journalism: structural conditions have been (re-)designed by central political incumbents, economic actors and media practitioners in order to serve their personal interests. Moreover, they changed repeatedly during the different phases of transition and consolidation.

Although the literature allowed for a comprehensive country report, various knowledge gaps exist in relation to the different dimensions of structural conditions in Serbia. This applies, for instance, to ownership structures and media funding which both lack transparency. Moreover, difficulties in getting reliable and up-to-date information arise from the changing number of licenced media outlets in Serbia.

In conclusion, the report provides a useful basis for an informed analysis of MeCoDEM interviews with journalists, with regard to the structural conditions shaping media and journalism in Serbia. While the list of dimensions (Table 1) provides insight into the general factors which potentially shape journalism and media on a structural level and how they interrelate with each other, the country report provides a comprehensive overview of the current structural conditions of media and journalism. The interviewees' statements on their working practices, role perceptions, ethical orientations and overall performance in the various democratisation conflicts can be analysed and better explained against this background. Moreover, as the paper includes the analysis of political systems and socioeconomic frameworks as well as political cultures of politicians and citizens in Serbia, it provides a useful background for MeCoDEM research on conflict communication by civil society and political activists

(work package 5) as well as for the analysis of conflict management by governmental actors (work package 6).

MeCoDEM interviews with journalists in Serbia will provide additional empirical-based knowledge on cases and types of journalism embedded in certain structural conditions, i.e. how journalists act within these structures. This research will not only allow us to considerably deepen knowledge on certain dimensions of structural conditions already mentioned in this working paper, but will most probably also elicit new structural factors of media and journalism which have not been considered in literature so far. On this basis, MeCoDEM findings will constitute a first step to reconsider and potentially expand the existing work on media systems and structural conditions of journalism in Serbia.

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