

# ТЕМЕ

ЧАСОПИС ЗА ДРУШТВЕНЕ НАУКЕ

UDK 1+3

1  
—  
2021

ISSN 0353-7919

# ТЕМЕ 1/2021

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**САЊА ИГЊАТОВИЋ**

Часопис излази тромесечно

Тираж: 140 примерака

Часопис је доступан преко Index Copernicusa,  
„Онлајн библиотеке централне и источне Европе”  
(CEEOL), EBSCO базе и Српског читатног индекса  
Реферисан у DOAJ, ERIH PLUS

Published by

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Тел. (018) 257-095

Штампа „UNIGRAF-X-COPY”, Ниш



CIP - Каталогизација у публикацији  
Народна библиотека Србије, Београд

3

**ТЕМЕ** : часопис за друштвене науке / главни  
и одговорни уредник Сузана Ђукић. - Год. 13,  
бр. 1/2 (1990)- . - Ниш : Универзитет у Нишу,  
1990- (Ниш : Unigraf-х-сору). - 24 cm

Тромесечно. - Је наставак: Marksističke teme  
(Niš) = ISSN 0351-1685  
ISSN 0353-7919 = Teme (Niš)  
COBISS.SR-ID 559631

**Публиковање часописа ТЕМЕ суфинансира  
Министарство просвете, науке и технолошког развоја Републике Србије.**

# ТЕМЕ

ЧАСОПИС ЗА ДРУШТВЕНЕ НАУКЕ

ТЕМЕ, г. XLV, бр. 1, јануар–март 2021, стр. 1–405

UDK: 1+3

ISSN 0353-7919

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**ОБРАЗОВАЊЕ  
EDUCATION**



## ПРИПРЕМА БУДУЋИХ УЧИТЕЉА И ПРОБЛЕМ ФОРМИРАЊА КУЛТУРНОГ ИДЕНТИТЕТА

Весна С. Трифуновић<sup>1\*</sup>, Данијела Здравковић<sup>2</sup>,  
Драгана Станојевић<sup>2</sup>

<sup>1</sup>Универзитет у Крагујевцу, Факултет педагошких наука, Јагодина, Србија

<sup>2</sup>Универзитет у Нишу, Педагошки факултет, Врање, Србија

### Апстракт

У Републици Србији се од 2000. године спроводе реформе образовања са циљем хармонизације овог важног подручја друштва са тзв. европским образовним простором. Читав низ измена које су законски усвојене и у пракси се спроводе на свим нивоима институционализованог образовања су, углавном, усмерене ка стандардизацији и унификацији „националног” образовања са образовним парадигмама неолибералног друштва. Одржавање континуитета развоја културе и формирање културног идентитета су важна питања за укупни друштвени развој, а њима се у стратегији образовања не поклања одговарајућа пажња, као што је и институционална припрема будућих учитеља недовољно усредсређена на ову проблематику.

У овом раду се разматрају: 1) нормативни оквир који уређује подручје основног образовања и формирање културног идентитета у Републици Србији, 2) чиниоци који утичу на процес обучавања будућих учитеља за формирање културног идентитета и 3) компетенције учитеља као подршка формирању културног идентитета деце млађег школског узраста.

Истиче се значај усаглашености основних смерница нормативног оквира који уређује основно образовање и формирање културног идентитета са основним интенцијама припреме будућих учитеља – нарочито са аспекта улоге учитеља у процесу утемељења и очувања културног идентитета генерација пристиглих за обухват обавезним основним образовањем у контексту међугенерациског преношења културе, културних образаца и вредности. Истиче се, притом недовољна, присутност садржаја у обучавању будућих учитеља који би их на одговарајући начин припремили за разумевање сложеног проблема формирања културног идентитета.

Аутори истичу важност утемељености припреме будућих учитеља на академским знањима о друштву, историји и култури. Рад има за циљ да истакне значај развијања компетенција учитеља неопходних за разумевање проблема идентитета и конституисање културног идентитета.

У раду ће бити коришћена дескриптивно-аналитичка метода.

**Кључне речи:** припрема будућих учитеља, културни идентитет, вредности, студијски програми, компетенције учитеља.

\* Аутор за кореспонденцију: Весна С. Трифуновић, Универзитет у Крагујевцу, Факултет педагошких наука, Милана Мијалковића 14, 35000 Јагодина, Србија, dimitrije95@ptt.rs

## THE EDUCATION OF FUTURE TEACHERS AND THE PROBLEM OF THE FORMATION OF A CULTURAL IDENTITY

### Abstract

In the Republic of Serbia, education reforms have been implemented since 2000 with the aim of harmonizing this important field of society with the so-called European Education Area. The whole range of changes lawfully adopted and applied in practice at all levels of institutionalized education is mainly directed towards the standardization and unification of "domestic" education with the educational paradigms of a neoliberal society. Maintaining the continuity of cultural development and the formation of cultural identity are important issues for overall social development, and they are not given proper attention in the education strategy. In addition to that, the institutional preparation of future teachers does not sufficiently focus on this issue.

In this paper we consider: (1) the normative framework that regulates the field of primary education and the formation of cultural identity in the Republic of Serbia, (2) the factors influencing the process of training future teachers for the formation of cultural identity and (3) the teachers' competencies as a support to the formation of the cultural identity of younger school-age children.

The importance of the harmonization of the basic guidelines of the normative framework regulating primary education and the formation of cultural identity with the basic intentions of preparing future teachers is emphasized. Especially from the perspective of the role of teachers in the process of establishing and preserving the cultural identity of generations reaching compulsory primary education in the context of intergenerational transmission of culture, cultural patterns and values. At the same time, the paper emphasizes the insufficient presence of content in the education of future teachers that would adequately prepare them for understanding the complex problem of forming a cultural identity.

The authors point out the importance of the groundedness of future teachers' preparation in terms of their academic knowledge of society, history and culture. The aim of the paper is to emphasize the importance of developing teachers' competencies necessary for understanding identity issues and forming a cultural identity.

The paper employs the descriptive-analytical method.

**Key words:** preparation of future teachers, cultural identity, values, study programs, teachers' competencies.

### УВОД

У разматрању проблематике припреме будућих учитеља за активно учешће у стварању основа за формирање културног идентитета нових генерација пристиглих за обухват основним образовањем, пошло се од схватања да институције друштва, нарочито школа, активно учествују у преношењу културе: 1) према Емилу Диркему (Emile Durkheim), битна улога образовног система је преношење културе друштва као целине (Диркем, 1981); 2) према Пјеру Бурдијеу (Pierre Bourdieu), образовни систем репродукује културу владајућих група, дефинисану као културу достојну тежње и поседовања (Bourdieu, 1973); 3) Џон Г. Огбу (John G. Ogbu) сматра да је основна

улога образовног система његова трансмисиона улога – преношење доминантне културе учесницима образовања (Ogbi, 1989); 4) према Зорану Аврамовићу, питање преношења доминантне културе компликује се у друштвима која су поликултурна јер се поставља питање праве размере између културолошких садржаја већине и мањина које чине дато друштво и начина њиховог преношења кроз школске програме (Аврамовић, 2003).

Школе су, по свему судећи, важан извор формирања културе: остварују снажан утицај на индивидуу, „уводе је у културу” и омогућују да „постане пуноправни члан друштва” (Кон, 1991, р. 183). Посебно се издваја улога учитеља за децу млађег школског узраста (деца узраста од 7 до 11 година). Учитељи могу да, преносећи или потискујући одређене вредности и обрасце културе, утичу на *могућност* формирања културног идентитета школске деце. Да ли ће и на који начин учитељ остварити ту могућност у великој мери је повезано са његовом припремом – знањем и вештинама којима је овладао и ставовима које је формирао кроз институционализовано образовање.

Припрема будућих учитеља одређена је друштвеним циљевима образовања и основном идејом о социјалној и културној организацији живота коју заступају владајуће групације. Учитељ је, дакле, у свом деловању, које укључује и деловање у процесу стварања основа за формирање културног идентитета школске деце, ограничен ширим друштвеним интересима и потребама, које могу бити подстицај или препрека утемељењу и развијању колективних идентитета.

У савременом добу се појму образовања придају значења до некле различита од уобичајеног поимања као „структуриране трансмисије знања унутар формалне институције” (Giddens i Birdsall, 2007, р. 523). Образовање се данас не одвија само у институционалним оквирима, а његова основна улога није само припремање појединаца за остваривање радних улога у складу са достигнутом подолом рада у датом друштву, већ представља и припрему за смислени живот: образовање „спрема људе за запослење и, још битније, за вођење смислених живота” (Nusbaum, 2012, р. 19). Остваривање ове припреме повезано је са разумевањем суштинских циљева образовања у култури датог друштва. Повезаност између образовања и културе, као референтног оквира у коме се одвија, претпоставља разоткривање читавог низа сложених међуутицаја, у чему *култура* има одређујући утицај на подручје образовања. Култура и социјална организација унутар које се развија структурирају подручје образовања – утврђују друштвену улогу и циљеве образовања, вредности које ће преносити, моделе понашања које ће обликовати. Сви наведени аспекти деловања су нормирани и представљени датим политикама образовања, укључујући и „политику” културне репродукције и ра-

споделе културног капитала међу припадницима различитих социо-културних групација у друштву.

Опстанак културе подразумева њено непрестано преношење и богаћење управо кроз образовање, „а сврха организованог образовања је постизање овог циља” (UNESCO, 2006: 13). Образовање, дакле, посредује култури. Језик, обичаји, традиција, религија као конститутивни елементи културе (Божиловић, 2010) добијају посебну улогу у процесу формирања културног идентитета. Културни идентитет је облик колективног идентитета, али и, према Загорки Голубовић (1999), објективна основа самоидентитета која остварује одлучујући утицај на појединца. Успостављени колективни идентитет у значајној мери утиче на појединца и формирање његовог *осећаја припадња група*, тј. утиче на „веровања, вредности и опредељености, а у неким случајевима и одговарајуће понашање и склоности” (Гевирц и Криб, 2012, р. 233). Грађење идентитета је процес који подразумева активитет појединца и његову спремност да стално промишља о себи и другима. Међутим, не подразумева прихватање једном добијених одговора на кључна питања као једино могуће одговоре. Грађење идентитета је *процес*, а не једнократни чин који успоставља једнозначни реалитет. Непрестано промишљање света и себе самог појединца води „ка питањима о властитом месту и односима према тим световима и сталном довођењу у питање властитог идентитета” (Стојковић, 2008, р. 39), као и опредељењу за његову одбрану или редефинисање.

Полазиште за дефинисање *културног идентитета* према Бранимиру Стојковићу (2008) могу бити следећи елементи: „а) истовремено везивање идентитета за појединца и групу, б) схватање идентитета као односа (релације) према другоме, односно према другима, в) историјска природа (променљивост) идентитета, г) релативност идентитета у односу на контекст (друге идентитете)”. На основу назначених елемената, исти аутор дефинише културни идентитет као „самосвест припадника једне групе која историјски настаје и развија се у зависности од критеријума које та група успоставља у односима са припадницима других група” (Стојковић, 2008, р. 26). Елементи попут *односа према другоме, променљивост, контекстуалности, повезаности и са појединцем и са групом* указују на вишедимензионалност и сложеност овог појма. Културни идентитет припадници једног друштва граде на свести о поседовању заједничких културних карактеристика и деле вредносне садржаје који конституишу културу, и то традицију, језик, религију, право, обичаје, фолклор, митологију, уметност (УНЕСКО, 1982). Појединци и групе формирају културни идентитет путем социјалног учења (Коковић, 2009), тј. формирају вредносни референтни оквир који подразумева рефлексивно су-

очавање са сопственом културом и њено реинтерпретирање (Голубовић, 1999).

Неопходно је да институционализовано образовање у домену формирања културног идентитета оствари два задатка: а) пренеси знања о различитим елементима културног идентитета (језик, традиција, историја, уметност и др.) и б) омогући да се пренето знање *доживи као властито*. Уколико је основна намера друштва очување континуитета културног развоја, онда постаје важно која се знања и вредности преносе образовањем (Огби, 1989; Гевирц и Криб, 2012) и да ли пренета знања представљају основу за формирање културног идентитета самих учесника образовања.

### МЕТОД

*Предмет* овог рада је истраживање основних смерница нормативног оквира који уређује основно образовање у равни формирања културног идентитета и усаглашеност припреме будућих учитеља са аспекта њихове улоге у процесу формирања културног идентитета деце млађег школског узраста.

*Циљ* је да се испита: а) да ли законски документи који уређују први циклус основног образовања и васпитања омогућавају остваривање општих циљева и исхода образовања који се односе на неговање културног идентитета, уважавање и поштовање културних различитости; б) да ли институционализована припрема будућих учитеља пружа адекватна знања о друштву, историји и култури, важна за разумевање идентитарног феномена и формирање културног идентитета.

У складу са предметом и циљевима рада, постављени су следећи *задачи*:

1) анализирати нормативни оквир који уређује подручје основног образовања са аспекта формирања културног идентитета;

2) анализирати образовање учитеља са аспекта стицања компетенција за формирање културног идентитета деце млађег школског узраста.

Формулисана је следећа општа хипотеза:

Са аспекта формирања културног идентитета у Републици Србији, нормативни оквир који уређује подручје основног образовања пружа могућност развијања осећаја припадности ученика одређеној културној заједници, прихватања за њу карактеристичних вредности и разумевања различитих културних идентитета. Међутим, припрема будућих учитеља није усаглашена са поменутих намерама.

Формулисане су и следеће посебне хипотезе:

1) Студијски програми за учитеље не нуде у довољној мери садржаје који су у функцији разумевања друштва у коме живе и света у целини – недостају садржаји у којима је на конзистентан начин

представљена економска, социјална, политичка и културна проблематика.

2) Студијски програми за учитеље не нуде у довољној мери садржаје који представљају основу за формирање културног идентитета.

Методе коришћене у овом раду су: анализа секундарне грађе (међународних докумената и домаћег „крвног” закона о основном образовању, студијски програми Факултета педагошких наука у Јагодини), грађе која уређује однос *образовање – културни идентитет*, дескриптивни метод. Коришћена је и анализа случаја.

У области друштвених наука анализа случаја је врста квалитативне анализе. У социологији се употребљава више сличних израза: студија случаја (енгл. *case analysis*) и метод случаја (енгл. *case method*).

Анализа случаја није заправо нека специфична техника, него начин организовања социјалних података, с циљем да се сачува јединствени карактер објекта који се проучава (Гуд и Хет, 1996, р. 12). Пошто се оријентише на проучавање целине случаја, тај приступ се означава као холистички. Притом „случај” може бити све – од појединца, па до глобалног друштва. Анализом случаја постиже се интензитет и дубина у социолошким истраживањима. Ипак, један од највећих недостатака ове методе налази се у чињеници да се тешко обезбеђује квалитативна стандардизација у прикупљању и анализи података. То је вероватно разлог што су се најчешће приговори критичара анализе случаја односили на пристрасност истраживача и на непоузданост прикупљених података (Суботић, 2011, стр. 425). И поред наведених опасности, аутори су се определили за наведену анализу будући да она пружа могућност за формулисање плодних хипотеза за даље истраживање дате проблематике.

### *НОРМАТИВНИ ОКВИР ОСНОВНОГ ОБРАЗОВАЊА СА АСПЕКТА ФОРМИРАЊА КУЛТУРНОГ ИДЕНТИТЕТА*

Повезаност између друштва и образовања може се пратити у равни исказивања друштвених интереса кроз приоритете образовних политика, и то на нивоу одређивања циљева образовања, циљева предмета на различитим нивоима образовања и компетенција учесника одређених образовних циклуса. У различитим земљама приоритети образовања се разликују: анализа ОЕЦД-а (*Organization for Economic Cooperation and Development*) показује да у дефинисању кључних компетенција актери из различитих подручја друштва (економије, образовања, политике, културе, науке, уметности) нису сагласни – најмање сагласности било је за компетенције повезане са културним идентитетом (Trier, 2001).



Српско друштво тежи интеграцији са Европском унијом (ЕУ), а образовање, које се испољава као инструмент интеграције, усаглашава се са тзв. европским образовним простором. У земљама чланицама ЕУ кључне компетенције за целоживотно учење (Recommendation of the European Parliament and of the Council on key competences for lifelong learning, 2006) укључују и компетенцију *културна свест и израз*, која се непосредно тиче културног идентитета.

Глобализацијски процеси намећу стандардизацију у готово свим подручјима различитих друштава, а подручје образовања је нарочито изложено овим утицајима, чији је крајњи ефекат његова *хомогенизација*: националне образовне политике прихватају наднационалне смернице и препоруке које уређују подручје образовања (Барлоу и Робертсон, 2003).

Читав низ препорука различитих међународних организација има снажан утицај на избор и начин преношења знања која представљају основу за уређење подручја образовања и формирање културног идентитета у Републици Србији: 1) *Универзална декларација о културној разноликости* (Организација за образовање, науку и културу Уједињених нација – УНЕСКО, 2001); 2) *Смернице за интеркултурално образовање* (УНЕСКО, 2006); 3) *Бела књига о интеркултуралном дијалогу* (Савет Европе, 2008); 4) *Препорука о интеркултуралном дијалогу и сличности о другоме у настави историје* (Савет Европе, 2011); 4) *Повеље о образовању за демократско грађанство и људска права Савета Европе* (2010); 5) *Препорука Скупштине Савета Европе о религији и демократији* (1999); 6) *Препорука савета Европе Образовање и религија* (2005); 7) *Препорука о матерњем језику у школском образовању* (Савет Европе, 2006); 8) *Препорука о унапређењу наставе европске књижевности* (Савет Европе, 2008); 9) Приручник са смерницама о припреми планова и програма за наставу о религијама и веровањима: *Toledo guiding principles on teaching about religions and beliefs in public schools* (Организација за европску сарадњу и безбедност – ОЕБС, 2007); 10) *Европска агенда за културу* (Резолуција Савета Европске уније, 2007).

Заједнички именитељ наведених докумената је мултикултурални концепт који се заснива на универзалним вредностима, на поштовању културних разлика и уважавању различитих културних идентитета (Трифуновић, 2012). У складу са наведеним међународним документима, у Републици Србији су донети закони о основном образовању и основној школи који су, између осталог, имали за циљ сензитивизацију образовања за питања културног идентитета: *Закон о основама система образовања и васпитања*, 2009; *Закон о основном образовању и васпитању* 2013, 2017. и други.

Циљеви образовања и васпитања у члану 4 закона из 2009. године су да појединац стекне знања, развије способности и формира

ставове који ће му, сматра се, омогућити да кроз најразноврсније интеракције у друштву оствари пун развој личности. Већина циљева индиректно је повезана са вредностима културе, у најширем смислу, а у тачкама 13, 14 и 15 наведене су вредности повезане са културним идентитетом које се кроз образовање преносе и развијају, и то: а) „развијање способности за улогу одговорног грађанина, за живот у демократски уређеном и хуманом друштву заснованом на поштовању људских и грађанских права, права на различитост и бризи за друге...” (тачка 13); б) „формирање ставова, уверења и система вредности, развој личног и националног идентитета, развијање свести и осећања припадности држави Србији, поштовање и неговање српског језика и свог језика, традиције и културе српског народа, националних мањина и етничких заједница, других народа, развијање мултикултурализма, поштовање и очување националне и светске културне баштине” (тачка 14); в) „развој и поштовање расне, националне, културне, језичке, верске, родне, полне и узрасне равноправности, толеранције и уважавање различитости” (тачка 15). Идентично формулисани циљеви налазе се и у *Закону о основном образовању и васпитању* донетом 2013. године.

У *Закону о основном образовању и васпитању* донетом 2017. године, циљеви основног образовања и васпитања у члану 21, ставови 15 и 16 тичу се проблематике културног идентитета. Циљеви основног образовања су, поред других, и „развој и поштовање расне, националне, културне, језичке, верске, родне, полне и узрасне равноправности, толеранције и уважавање различитости” (став 15), као и „развијање личног и националног идентитета, развијање свести и осећања припадности Републици Србији, поштовање и неговање српског језика и матерњег језика, традиције и културе српског народа и националних мањина, развијање интеркултуралности, поштовање и очување националне и светске културне баштине” (став 16).

У документу названом *Стратегија образовања у Републици Србији до 2020. године* (у даљем тексту *Стратегија*) одређују се правци развоја образовања у домену културе и културног идентитета. *Стратегија* истиче потребу „...да се истрајно и посвећено чува и негује национално културно наслеђе и идентитет, развија толерантан и кооперативан однос према другим културама и јача допринос културе укупном квалитету живота становника Републике Србије” (стр. 5). Истакнуто је да је темељ целокупног система образовања и васпитања *основно образовање и васпитање*, чија је једна од функција и да развија „ставове и вредности неопходне за формирање националног и културног идентитета...” (стр. 28).

*Стратегија* наглашава опредељење за формирање, развој и очување културног идентитета заснованог на сопственом културном наслеђу и опредељење за поштовање и разумевање културних специ-

фичности и разлика које из њих проистичу на локалном и глобалном нивоу.

Исходи основног образовања и васпитања конкретизују очекиване резултате овог нивоа: у члану 22 *Закон о основном образовању и васпитању* (2013) наведени су исходи у 14 тачака, међу којима су и исходи повезани са формирањем културног идентитета. Претпоставља се да ће ученици који су завршили основно образовање усвојити вредности културног идентитета заснованог на сопственом културном наслеђу и универзалним вредностима, и то: а) „имати развијено осећање припадности сопственој породици, нацији и култури, познавати сопствену традицију и доприносити њеном очувању и развоју” (Закон, 2013, члан 22, тачка 12); б) „знати и поштовати традицију, идентитет и културу других заједница и бити способни да сарађују са њиховим припадницима” (Закон, 2013, члан 22, тачка 13); в) „умети да препознају и уваже људска и дечја права и бити способни да активно учествују у њиховом остваривању” (Закон 2013, члан 22, тачка 11).

У *Закон о основном образовању и васпитању* (2017) наведени су исходи основног образовања и васпитања у члану 22, међу којима су и исходи повезани са стварањем основе за формирање културног идентитета (став 12 и 13). У ставу 12 се истиче да ће ученици „имати развијено осећање припадности сопственој породици, нацији и култури, познавати сопствену традицију и доприносити њеном очувању и развоју”, док се у ставу 13 наглашава да ће ученици „знати и поштовати традицију, идентитет и културу других заједница и бити способни да сарађују са њиховим припадницима” (Закон, 2017, члан 22, став 12 и 13).

### **ОБРАЗОВАЊЕ БУДУЋИХ УЧИТЕЉА И ФОРМИРАЊЕ КУЛТУРНОГ ИДЕНТИТЕТА**

Свакој етапи у развоју друштва „одговара” и одређена представа о појединцу, која се уобличава у његовом сусрету са различитим друштвеним механизмима, укључујући и институционализовано образовање. Нова парадигма образовања учитеља истиче потребу професионализације овог занимања, која се заснива на стицању систематски заокруженог теоријског знања о образовању, које укључује филозофску, социолошку, педагошку, психолошку, антрополошку, културолошку димензију образовања. Неопходно је да студијски програми за припрему учитеља, почев од академских основних студија, преко мастер и докторских студија, буду у функцији остваривања циљева и достизања исхода предвиђених *Законом о основном образовању и васпитању*. Један од тих циљева тиче се и припреме учитеља за стварање основе за формирање културног идентитета

ученика млађег школског узраста, што подразумева и њихово овладавање знањима из социологије, културе и историје. У том контексту, творци образовних политика морали би да постигну консензус о групи обавезних предмета који „долазе” из наведених научних дисциплина, а који би постали интегрални део студијских програма за учитеље. Висок академски ниво базичног образовања учитеља ствара претпоставке за њихов квалитетнији професионални развој. Друштво данас очекује од учитеља да, у складу са порастом комплексности њихове улоге у васпитнообразовном процесу, поседују бројне професионалне компетенције (инструменталне, интерперсоналне, системске). Пресудну улогу у формирању професионалних компетенција учитеља имају студијски програми на високошколским институцијама које обучавају учитеље.

Реформа образовања у равни студијских програма за образовање учитеља, која траје скоро две деценије, у првом реду тежи усклађивању са европским образовним стандардима. У пракси је то означило увођење „тростепеног студирања” (основне, мастер и докторске студије) и редизајнирање студијских програма, чији је заједнички именуатељ редуковање тзв. обавезних предмета из друштвено-хуманистичког поља, нарочито из научних области *Социологије*, *Историје* и *Науке о култури*, који представљају темељ за разумевање идентитарног феномена и важности формирања културног идентитета у условима растућег глобализма. Аутономија факултета у осмишљавању студијских програма довела је до различитих схватања о „степену важности” друштвених наука и општеобразовних предмета који их представљају, нарочито од 2006. године. На примеру Факултета педагошких наука у Јагодини, могу се уочити следећи процеси након прихватања тзв. Болоњског режима студирања (2006): 1) *редуковање предмета из научне области Социологије* – (а) из студијског програма основних академских студија *Учитељ* искључени су предмети Општа социологија, Социологија породице и детињства и Савремено друштво и демократија, предмет у оквиру модула Грађанско васпитање, као и сâм модул; 2) *елиминисање садржаја из историје* искључивањем предмета *Интердисциплинарни семинар на смеру Учитељ*, чији су интегрални део били и садржаји из историје; 3) *фрагментизација предмета* – свођење смислене целине једног подручја проучавања на парцијална питања (фрагменте) који добијају статус предмета, што онемогућује студенте да сагледају и разумеју све димензије дате проблематике (Књига предмета, 2014). Генерације учитеља су, дакле, већ одшколоване, а да нису имале додир са *општом социологијом*, *историјом* и *систематизованим садржајима који би их упознали са развојем властите културе и културе уопште*.

Теоријски, важну улогу у образовању будућих учитеља имају тзв. предмети из корпуса друштвених наука, посебно из социолошке

научне области, и то следећи предмети: Социологија или Увод у науку о друштву, Социологија породице, Социологија детињства, Социологија културе.

Противљење социолошком образовању будућих наставника долази од стране оних који не располажу потребним знањима из социолошких наука, али и уколико располажу тим знањима, по природи су конзервативни. У сваком случају, противљење овом образовању тежи свођењу наставника на методичке практичаре, прагматичне репродуктивце и оспорава њихово формирање као широко образовних интелектуалаца који треба да остваре нов квалитет основног образовања (...) у „учећој цивилизацији” двадесет и првог века (Марковић, 2005, стр. 88).

Речју, у овом раду упоришна тачка није омеђена једино устаљеном вишегодишњом праксом о значају и важности социолошког образовања наставника у основном образовању, већ се истиче потреба и валоризација научног проучавања образовања као друштвене појаве у оквиру структуре студијског програма на смеру Учитељ. Очигледно је да се у структури поменутог студијског програма налази само један предмет из уже научне области Социологија као обавезни општеобразовни, и то Социологија образовања (на првој години студија). У оквиру изборног предметног подручја основних академских студија (ОАС) Учитељ у оквиру предмета изборног блока 1 (прва година студија) студентима се даје могућност да, између других, бирају предмет Породица и савремено друштво. Такође, на другој години студија изборно предметно подручје ОАС Учитељ у оквиру предмета изборног блока 3 студентима омогућује да, између других, бирају предмет Култура младих (Табеларни приказ студијског програма, 2018).

Редукција теоријских знања о друштву и култури, као и непостојање садржаја из историје, ускраћује студентима, будућим учитељима, ону врсту знања која им омогућује да остваре улогу припремања деце млађег школског узраста за *живот у друштву*, што је, иначе, једна од препорука Међународне комисије за развој образовања у 21. веку (Делор, 1996). Усвајањем одређеног корпуса знања о друштву, култури и историји будући учитељи били би припремљени да препознају елементе важне за формирање културног идентитета школске деце, правећи разлику између оних који су на добробит појединца и опште добро и оних који су етноцентрични.

Знања добијена у институционализованом процесу образовања и професионалне компетенције које је учитељ развио, претпоставља се, омогућују учитељу да буде проактивни учесник у процесима социјализације и културализације деце млађег школског узраста. Учитељ, захваљујући иницијалном образовању, може да постане

важан чинилац формирања идентитета школске деце: индивидуалног и колективних, а посебно културног идентитета.

Формирани културни идентитет одређује однос појединца према групи из које потиче и према различитим другим групама. Учитељ који је стекао широка општа знања о друштву, историји и култури може значајно да утиче: 1) на формирање свести школске деце о посебности групе којој припадају и разумевање *различитости* карактеристичних за *друге* појединце и групе; њихове способности да „ствари” посматрају из позиције *другог* и способности за емпатију и саосећање са *другима*; 2) на формирање свести школске деце о посебности групе којој припадају и успостављање односа према *другима*. Стога је неопходно да се у процесу образовања будућих учитеља развијају и компетенције за разумевање проблема идентитета и формирање културног идентитета. Њихово развијање, међутим, не може да се поистовети са усвајањем одређених садржаја у оквиру одређеног предмета датог студијског програма, већ пре представља дугорочан процес у току кога се кроз учење, практичан рад и истраживачке делатности усвајају знања, стичу вештине и развијају способности усмерене ка спознаји комплексне проблематике идентитета и, на крају, успешном стварању основа за формирање културног идентитета деце млађег школског узраста.

### ЗАКЉУЧАК

У разматрању проблематике образовања будућих учитеља и формирања културног идентитета, дошло се до следећих закључака:

1) У документима који уређују подручје основног образовања у Републици Србији очигледно је декларативно опредељење за мултикултурални концепт који се заснива како на очувању сопственог културног наслеђа тако и на универзалним вредностима; затим, на поштовању културних разлика и различитих културних идентитета. Национална регулатива је у овом домену у потпуности усклађена са препорукама различитих међународних докумената и представља израз хармонизације „домаћег” образовања са ширим образовним простором, пре свега европским.

2) На факултету који образује будуће учитеље од 2006. године долази до редукције теоријских знања о друштву и култури и до елиминисања садржаја из историје (који су били део предмета Интердисциплинарни практикум), што доводи до неадекватне припремљености дипломираних учитеља за активно учествовање у процесу формирања културног идентитета деце млађег школског узраста. Стога је неопходно редизајнирање студијског програма у циљу инкорпорирања ширих знања о друштву, култури и историји кроз одговарајуће обавезне студијске предмете.

3) Развој професионалних компетенција учитеља је у непосредној вези са дефинисањем стандарда у образовању учитеља, као и питањем базичне припреме учитеља. Концепт образовања учитеља, међутим, није хармонизован на територији Републике Србије: разлике у „понуди” општеобразовних предмета, у броју обавезних предмета и понуди изборних предмета могу да буду повезане са припремљеношћу учитеља за стварања основе за формирање културног идентитета.

4) Постоји неусаглашеност нормативног оквира који уређује основно образовање са аспекта формирања културног идентитета и основних интенција институционализованог образовања будућих учитеља у димензији њихове припреме за вођење процеса утемељења и очувања културног идентитета генерација пристиглих за обухват обавезним основним образовањем.

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## **THE EDUCATION OF FUTURE TEACHERS AND THE PROBLEM OF THE FORMATION OF A CULTURAL IDENTITY**

**Vesna S. Trifunović<sup>1</sup>, Danijela Zdravković<sup>2</sup>, Dragana Stanojević<sup>2</sup>**

<sup>1</sup>University of Kragujevac, Faculty of Education in Jagodina, Serbia

<sup>2</sup>University of Niš, Faculty of Pedagogy in Vranje, Serbia

### **Summary**

Changes in learning organization are related to the social and cultural organization and in this light, it is beneficial to observe the education of future teachers in the Republic of Serbia since 2000. The demand for the harmonization of the Serbian society with the European Union (EU) standards is realized, first of all, through the harmonization of education with the so-called common European Education Area that is particularly sensitive to issues in the sphere of culture as culture plays a highly important role in the external relations of the European Union and its international cooperation. The European Agenda for Culture encourages the creation of a common cultural space that is perceived as crucial to the European integration process. Cultural specifics, multilingualism, values and heritage are respected in order to promote cultural diversity and the transversal role of culture. The educational reform in Serbia seeks to harmonize the normative framework regulating all levels of education, including elementary, with recommendations at the international level and within the European Union. The synergy of culture and education stands out as a strategic goal. In this light, the education of future teachers gains in importance, especially from the aspect of their preparation for creating the basis for the formation of the cultural identity of younger school-age children.

In addition to the normative framework, the creation of the basis for the formation of a cultural identity in institutionalized education implies the existing consensus on this issue between various important factors in society. Therefore, it is important to constantly review the strategic documents that regulate the field of education with the aim of including those determinants that will create the basis for the formation of the cultural identity of the participants in the educational process. The analysis of "domestic" documents regulating the field of primary education (Law on the Fundamentals of the Education System, 2009; Law on Primary Education and Upbringing, 2009, 2013, 2017) shows they are completely harmonized with the whole set of international documents concerning education and the relationship between culture and education. This confirms the general starting assumption: the normative framework regulating the field of primary education from the aspect of the formation of cultural identity in the Republic of Serbia provides the opportunity to develop the students' sense of belonging to a particular cultural community, the acceptance of its typical values and understanding of different cultural identities; however, the preparation of future teachers is not in line with these intentions.

On the other hand, the established tendencies in teacher education policy at teacher education and pedagogical faculties show, first, that the study programs reform has led to a reduction in subjects from the scientific fields of sociology, history and cultural sciences, which prevents the understanding of complex processes at the global level and in local communities. This confirms the first special hypothesis: study programs for teachers do not offer the sufficient amount of content in the function of understanding the society in which they live and societies world-wide - there is a lack of content in which the economic, social, political and cultural issue is consistently presented.

Secondly, the reduction in subjects from the scientific fields of sociology, history and cultural sciences prevents future teachers from responding to the challenge of creating the grounds for the formation of students' cultural identity. Teachers are not adequately prepared to achieve this important goal, which confirms the second special hypothesis: Study programs for teachers do not offer the sufficient amount of content that constitutes a basis for the formation of the cultural identity of younger school-age children.



## THE READINESS OF TEACHERS FOR IMPLEMENTING INFORMATION AND COMMUNICATION TECHNOLOGY IN SERBIAN HIGHER EDUCATION INSTITUTIONS

Danijela Šćepanović<sup>1\*</sup>, Isidora Korać<sup>2</sup>,  
Bojan Lazarević<sup>3</sup>

<sup>1</sup>Ministry of Education, Science and Technological Development,  
Belgrade, Serbia

<sup>2</sup>College of Professional Studies for Educators and Business Informatics  
Sirmium, Sremska Mitrovica, Serbia

<sup>3</sup>College of Education, University of Florida, Gainesville, Florida, USA

### Abstract

Recent advancements of Information and Communication Technology (ICT) and the increased use of ICT related services in the field of online learning offer a range of possibilities, but also pose a challenge for administration in the institutions of higher education. A plethora of official documents dealing with the analysis of how ICT is applied in teaching practice indicate the existing gap in teachers' digital competencies for its implementation. The paper discusses teachers' perceptions of various aspects related to the use ICT in teaching at higher education institutions, as well as their needs for professional development in this area. The study included 211 teachers employed in higher education institutions within the Universities of Belgrade, Novi Sad, Kragujevac, Novi Pazar, and Nis. Considering the purpose of this research, the authors designed a measuring instrument comprised of open and closed-ended questions. The study results indicate that teachers recognize the need for integrating ICT in instruction, while their perception of the level of access to ICT learning resources varies depending on the given technology or ICT related services. It is identified that the practical integration of ICT in the classroom still remains at an intermediate or relatively low level. With regard to teacher perception of the intensity of utilizing different software applications in direct instruction, the overall results demonstrate that basic business/productivity application packages such as MS Office are the predominant form of software used in the classroom, followed by Learning Management Systems (LMS). Finally, it is worth noting that teachers' perception of available professional development opportunities is considerably low, but coupled with a relatively high personal interest in participating in professional development activities.

**Key words:** information and communication technology, teachers, higher education, in-service teacher training, instruction.

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\* Аутор за кореспонденцију: Данијела Шћепановић, Министарство просвете, науке и технолошког развоја Републике Србије, Немањина 22, 11000 Београд, Србија, danijela.scepanovic@mpn.gov.rs

## СПРЕМНОСТ НАСТАВНИКА ЗА ПРИМЕНУ ИНФОРМАЦИОНО-КОМУНИКАЦИОНИХ ТЕХНОЛОГИЈА У ИНСТИТУЦИЈАМА ВИСОКОГ ОБРАЗОВАЊА

### Апстракт

Развој информационих и комуникационих технологија (ИКТ) и повећан обим услуга у области отвореног онлајн-образовања нуде низ могућности, али и представљају изазов за високо образовање. Бројни званични документи из области образовања који се баве анализом начина на које се ИКТ примењује у наставној пракси указују на недовољну развијеност дигиталних компетенција наставника. У раду се разматрају различити ставови наставника у вези са применом ИКТ-а у настави у установама високог образовања, као и потребе за стручним усавршавањем у овој области. У истраживању је учествовало 211 наставника запослених у установама високог образовања на универзитетима у Београду, Новом Саду, Крагујевцу, Новом Пазару и Нишу. У складу са сврхом истраживања, осмишљен је упитник са питањима отвореног и затвореног типа. Налази истраживања указују на то да наставници препознају потребу примене ИКТ-а у наставном процесу, док је њихова процена приступа ИКТ наставним материјалима различита у зависности од приступа технологији и ИКТ услугама. Утврђено је да је ниво практичне примене ИКТ-а у учионици и даље осредњи или релативно низак. Када је у питању употреба софтверских решења у настави, налази указују на то да преовладава примена основних софтверских решења као што је MS Office, а потом примена система за управљање учењем. Важно је истаћи да наставници сматрају да немају довољно прилика за учешће у програмима стручног усавршавања из ове области, а да су, са друге стране, веома заинтересовани да учествују у њима.

**Кључне речи:** информационо-комуникационе технологије, наставници, високо образовање, стручно усавршавање наставника, настава.

### INTRODUCTION

Bearing in mind the trends that shape modern education, among which information revolution dominates, it can be pointed out that one of the main challenges in the higher education system is to increase its capacity for the implementation of ICT in order to improve the quality of the learning process (Commission of the European Communities, 2008). In the period between 2008 and 2011, the volume of Internet traffic, measured in bytes, increased more than threefold (OECD, 2015) in European countries. According to the results of the OECD PISA 2012 survey in the Republic of Serbia Internet access for 15-year-olds increased between 2009 and 2012 more than 25%, and more than 30% of students accessed the Internet for the first time after they turned 13. The percentage of students in Serbia who reported having at least one computer at home in 2012 was higher than the OECD average (OECD, 2015).

According to Ferrari (2013), it is expected that prospective 21<sup>st</sup> century students tend to use ICT therefore, they should have the opportunity

to use learning technologies in the institutions of higher education. Efficient use of ICT in teaching involves not only the provision of the necessary computer equipment, but also the examination of user needs, permanent technical support, and specific competences of teachers. Competence can be defined as a dynamic combination of knowledge, skills and attitudes that enable individuals to actively and effectively operate in a particular situation (Pantić & Wubbels, 2010). The digital competence of teachers is one of the eight key competences needed for life in a knowledge-based society (European Commission, 2010, 2013). In order to successfully apply ICT in instruction, teachers are expected to be proficient in using computer applications (word processing, spreadsheet, database, storage and handling of information and the understanding of the opportunities and potential risks of the Internet and communication via electronic media) for the purpose of sharing and managing data, networking and setting up collaborative environments for learning and research (Haggard et al., 2013). Required skills include the ability to search, collect and process information, and to use it in a critical and systematic way, assessing the relevance and distinguishing reliable information from invalid content while recognizing the connections (The European Parliament and the Council of the European Union, 2006).

The OECD study focused on the analysis of current practices in using ICT in instruction, suggests that education systems are not yet ready to exploit the potential that technology can offer. Similar findings were obtained with regard to a number of specific institutions of higher education. The report related to its modernization (High Level Group on the Modernisation of Higher Education, 2013) emphasizes that the application of ICT in the classroom poses new challenges when it comes to teacher competencies needed for performing efficient instruction.

“Gaps in the digital skills of both teachers and students, difficulties in locating high-quality digital learning resources from among a plethora of poor quality ones, a lack of clarity on the learning goals, and insufficient pedagogical preparation for blending technology meaningfully into lessons and curricula, create a wedge between expectations and reality. If these challenges are not addressed as part of the technology plans of schools and education ministries, technology may do more harm than good to the teacher student interactions that underpin deep conceptual understanding and higher-order thinking.” (OECD, 2015, p. 190)

Furthermore, the European Commission in the report entitled *Opening up Education: Innovative Teaching and Learning for All Through New Technologies and Open Educational Resources* pointed out that all educational institutions should consider their organizational strategies in order to improve their capacity and teacher competences for the implementation of ICT (European Commission, 2013). Additionally, the document *Europe 2020: A Strategy for Smart, Sustainable and Inclusive Growth* (European Commission,

2010) recommends that the Member States should make distance learning a key element of national education policies on the path towards the modernization of the education system, with particular emphasis on reforms of curricula, the assessment of learning outcomes and the professional development of teachers. There are other documents proposed by the European Commission concerning education that emphasize the importance of teacher digital competence by providing the framework for their professional development in this area. For example, *Transforming Education: The Power of ICT Policies*; or *DIGCOMP: A Framework for Developing and Understanding Digital Competence in Europe and Others*.

A body of research suggests that the integration of ICT in instruction transforms higher education into a more effective learning environment (Cepni, Tas & Kose, 2006; Aloraini, 2012; Šćepanović, Marjanović i Radišić, 2016; Mayer, 2017). Both teachers and students recognized that the implementation of ICT facilitates effective communication, collaborative learning, and opportunities for creating virtual learning groups (Cairncross & Mannion, 2001). Additionally, it is highlighted that ICT contributes to the process of enhancing the quality of instruction since it introduces innovative instructional methods and strategies, stimulate students' motivation and commitment to the learning process (Moreno & Mayer, 2000a; Moreno & Mayer, 2000b; Mayer, 2017). However, some authors highlight that a significant number of learners utilize minimal affordances of ICT since there is uncertainty around data protection, etiquette, and digital competences (Sipos et al., 2015, Balazs, 2017). On the other hand, Balazs (2017) suggests that there are generational differences in using ICT in the process of learning. Students are more inclined to use various Web tools, while teachers primarily use basic computer programs without investing significant efforts in utilizing specific software packages. The author concluded that this practice is perceived as a barrier to conducting an effective instructional process.

To shed some additional light on this rather complex issue, we have assessed the availability of resources and the levels of educational technology in teaching at higher education institutions in the Republic of Serbia. Research presented in this paper aims to examine the attitudes of teachers regarding the application of ICT in teaching at higher education institutions and their in-service training needs as it was part of the broader research for a doctoral thesis (Šćepanović, 2016).

## METHODS

*Study Design, Purpose, and Research Questions.* The overall researchers' intention was to identify and describe a number of variables associated with teachers use and integration of ICT in the Serbian system of higher education. Additionally, the researchers' sought to determine the extent of the relationship between an array of specific variables to



obtain an in-depth understanding of the process relevant to the use of ICT in the state educational system. Therefore, the study design utilizes the descriptive and correlation-based approach with elements of surveying.

The following research questions were addressed: 1) What is the teachers' perception of the access level to ICT resources within their educational institutions? 2) What educational technologies and software do teachers use in instruction?; 3) What is the teachers' perception of professional development and participation in ICT related developmental projects?

*Population and Sample.* The researchers selected ten institutions of higher education encompassing all major academic centers in the Republic of Serbia (institutions within the Universities of Belgrade, Novi Sad, Kragujevac, Novi Pazar, and Nis) for the study. The institutions were selected on the basis of their previous participation in projects related to educational technology either previously financed through the European Union Tempus program, including programs implemented by the non-governmental organizations, such as World University Service - Austria. Another criterion was based on the existence of organizational units or departments dedicated to distance education development (e-learning, online teaching). This criterion was intentionally imposed, assuming that the existence of such units or departments indicate that the institution is interested in the integration of ICT in education and complimentary investments in this area. Therefore, the target population for this study were the educators who have participated in a variety of European Tempus programs since 2010. The purposive sampling technique was utilized in this research. Considering the study questions and limitations, this type of non-probability sample was an adequate selection.

Specifically, the sample consists of 211 teachers employed at higher education institutions, 51.2% of which were male and 48.5% female. Respondents were divided into age categories, where most respondents are in the category of 35-44 years (37.4%), while the second category respondents' age were between 22-34 years (29.4%) The majority of respondents hold the rank of assistant professor (31.3%) and teaching fellow (29.4%), while there were 15.6% of respondents with full-time professorship appointment. Other faculty ranks were represented by 9% of the total study subjects. (Table 1).

*Table 1. The distribution of the sample according to the teaching position*

Teaching position	N	%
Teaching Fellow	62	29.4
Assistant Professor	66	31.3
Associate Professor	31	14.7
Professor	33	15.6
Other Ranks (Teaching Associate, Lecturer & VET Teacher)	19	9
Total	211	100.0

As for the number of years of service in the institutions of higher education, the majority of faculty with a rank of assistant professor have 10-20 years of service (62.1%), while an equal number of Teaching Fellows at institutions of higher education have 1-5 and 5-10 years of service (40.3%). Finally, the number of respondents (78.8%) with the highest rank - full-time professor dedicated more than 20 years of service (62.1%) (Table 2.).

*Table 2. The distribution of the sample according to the years of service*

Years of Service	1-5	5-10	10-20	20 or more
Teaching Fellow	40.3%	40.3%	17.7%	1.6%
Assistant Professor	6.1%	28.8%	62.1%	3.0%
Associate Professor	--	6.5%	41.9%	51.6%
Professor	--	--	21.2%	78.8%
Other Ranks	47.4	15.8	26.3	10.5%

*Data collection and analysis.* For the purposes of this research, a questionnaire was developed for teachers of higher education institutions, which contained closed and open-ended questions. In relation to the defined research questions and tasks the following was investigated: 1) teachers' access to ICT resources; 2) teachers' use of education technology, namely the specific ICT tools usage; 3) teachers' opportunities for participation in ICT training programs in the past five years; 4) participation in projects related to ICT application in teaching.

Data analysis comprised of both descriptive statistics and correlational testing. The descriptive statistical analysis included measures such as distribution, central tendency, and dispersion of data. An additional statistical procedure was performed, as well. Pearson's Correlation Coefficient ( $r$ ) was used to measure the strength of the linear relationship between two selected study variables.

## RESULTS

The overall study findings suggest positive trends in utilizing ICT in the Serbian higher education system. The obtained data was sufficient to provide comprehensive insights and understanding of the current practices, including possible future directions of instructional ICT development.

Concerning the first research question pertaining to the teachers' perception of access level to ICT resources within their educational institutions, the results indicate strong teacher dedication to the process of integrating learning technologies in the curricula across the variety of academic disciplines. Research findings show that the majority of teachers who took part in

the survey reported that their need for the application of ICT in instruction is considerably high (42.7%) and high (42.2%). A minor percentage of faculty (12.3%) reported an intermediate level of need, while 2.4% of respondents indicated a very low level, and only 0.5% reported that the application of ICT in education is not required. Undoubtedly the obtained data suggests that teachers recognize the potential of emerging instructional technologies in teaching and learning.

Furthermore, the findings indicate that teachers' access to different ICT resources at their institutions is rated as moderately high ( $M = 3.85$ ,  $SD = 0.90$ ) on a five-point Likert scale. In their opinion, the availability of technical resources within the institution (especially computers and the Internet) is satisfactory, while the professional support is less accessible (Table 3).

*Table 3. Teachers' Perception of Access to ICT Resources in Schools*

ICT Resources	M	SD
Computer	4.76	0.62
Internet	4.77	0.59
Printing Documents	4.50	0.91
Copying & Scanning	4.38	0.99
Projector	4.45	0.82
CD & DVD Players	3.94	1.43
Audio & Video Equipment	3.21	1.53
Video-Conferencing Equipment	2.29	1.43
Web-hosting	4.12	1.17
Relevant Software Packages	3.64	1.25
Access to Academic Database	3.94	1.11
Technical Support	3.76	1.17
Pedagogical-Didactical Support	2.93	1.45
Professional Development - webinars	2.57	1.34
Total: Level of Access to ICT Resources	3.85	0.90

The extent to which teachers apply different ICT tools and software packages in the classroom was the second research question addressed in this study. The obtained findings show that the use of different software solutions in teaching is at a mediocre level at best ( $M=2.65$ ,  $SD=1.00$ ). Basic software packages, such as MS Office, have the highest applicability, with 70.1% of study respondents who regularly use this software in instruction, while all other applications are implemented to a much lesser extent (Table 4).

*Table 4. Teachers' Perception of the Intensity of Software Use in Teaching*

Software	Never	Rarely	Sometimes	Often	Always
	%	%	%	%	%
Basic Software Packages (MS Office)	1.9	0.9	5.2	28.1	70.1
Learning Management Systems (Moodle, Blackboard)	25.6	9.5	19.9	20.9	24.2
Instant Messaging Tools (Skype, Google Talk)	32.7	17.1	20.4	15.2	14.7
Social Networking Apps (Facebook, Google Apps, Ning)	43.6	19.4	17.1	11.8	8.1
Web development platforms (Blogger, Edublogs, Wikispaces)	51.2	21.8	16.1	8.1	2.8
Programs for creating and storing photos, audio and video recording (Flickr, iTunes, YouTube)	38.9	24.6	23.2	9.0	4.3

Additionally, the study goal was to identify several aspects related to Professional Development (PD) in the area of ICT for teachers in a five-year period. The condensed findings are presented in Table 5. With regard to the perceived level of available PD opportunities, the obtained findings suggest that teachers claim to have had relatively limited opportunities to participate in professional development programs ( $M=2.21$ ,  $SD=1.25$ ) in the last five years. The majority of teachers (37.9%) reported that they never had the opportunity to participate in professional development programs, 29.4% rarely had the opportunity, 18% often, 10.4% sometimes, and only 4.3% of respondents consider that professional development opportunities are always available. On the other hand, the findings show that teachers' interest in professional development is relatively high ( $M=3.61$ ,  $SD=1.15$ ) in comparison to perceived opportunities for participation.

When it comes to in-service training focused on the integration of ICT (e.g. computers) in teaching, 27.5% of respondents claim that they sometimes had the opportunity to receive in-service training in this field, almost the same number of teachers (27%) believe that they never had that opportunity, 21.8% consider it rare, 18% often, and 5.7% of participants perceived that training opportunities are constantly present.

*Table 5. Teachers' Level of Interest in ICT  
Related Professional Development*

Professional Development	M	SD
Level of Perceived PD Opportunities	2.21	1.55
Expressed Level of Personal Interests in PD	3.61	1.51
In-service Training focused on the Integration of ICT (computers) in instruction	2.54	1.22
Training Focused on the integration of LMS in instruction	3.65	1.15
Training Centered Around Topics within the area of Strategic Management in ICT	3.38	1.14

Intriguingly, a significant positive correlation was found between the teachers' age ( $M=3.26$   $SD=1.28$ ) and the overall perceived level of available opportunities for professional development ( $M=2.21$   $SD=1.24$ ),  $r = .159$ ,  $p < .001$ ,  $n=211$ . Thus, the results suggest that the higher perception of available opportunities for professional development is associated with seniority in general. However, the strength of the identified correlation is very weak.

Considering that teachers can acquire professional competence by participating in various institutional funded projects, the authors analyzed the number of projects involving the application of ICT in the classroom in which teachers participated in the last five years. Research findings indicate that the majority of respondents (54.5%) reported involvement in one to three projects of this type, while on the other side of spectrum 7.1% of teachers stated that they participated in more than seven projects.

Finally, qualitative research findings based on open-ended questions about professional development procedures indicate that educational institutions, in accordance with higher education legislation, developed relevant policies for conducting research and monitoring employees' scientific and professional development. Four out of ten assessed institutions have established annual institutional quotas regarding teacher participation in conferences and scientific events. These institutions typically have advanced IT systems for tracing teachers' scientific accomplishments. On the other hand, institutions that did not adopt the advanced IT systems for monitoring scientific work make *ad-hoc* decisions regarding teacher participation in conferences, or this participation solely depends on personal initiative. Nevertheless, all institutions highly value teacher involvement in scientific events and projects, and they seek to allocate significant resources to support this type of professional engagement. Study findings also indicate that research projects often consist of groups of teachers and the research topics do not necessarily reflect the institutional policies and strategic orientations.

## DISCUSSION

Study findings suggest that the majority of respondents acknowledge the need for the integration of ICT in instruction at institutions of higher education. These results are reassuring, considering that the number of students that have Internet access in Serbia increased significantly in the period between 2009 and 2012 (OECD, 2015). This trend continues; therefore, it can be assumed that future students will expect online and digital education to be the norm rather than the exception or innovation.

On the other hand, distance education programs enable institutions of higher education to provide more accessible educational services, expand their capacity and enrollment, enter new markets and enhance overall quality (Alstete & Beutell, 2004). This trend benefits students who might not otherwise be able to study due to financial challenges, lack of time, and spatial constraints (Šćepanović, Marjanović & Radišić, 2016). In addition, this trend adds an international dimension to educational programs and research (Lawton et al., 2013).

Study respondents indicate that there is a solid basis for the instruction supported by basic hardware and software, while there are certain limitations regarding the integration of subject-related software packages. The higher education teachers recognized the need for additional professional support and development in this area. The study results suggest that teachers perceive the IT infrastructure in institutions as a more dominant or essential factor that shapes instructional activities than the use of available software tools in instruction. A possible explanation for this finding is the lack of professional skills and a low level of teacher expertise and software proficiency. The results also demonstrate that the majority of teachers consider that there are limited opportunities for professional development in the area of educational ICT. However, it is worth noting that professional development for educational technology is essential, and it is reinforced by a body of research (OECD, 2015; Šćepanović, Marjanović i Radišić, 2016) which argues that a higher level of professional competencies is critical for student learning outcomes. Findings of other studies suggest that there are a number of investments in ICT that have failed and/or were unsustainable since those investments were made into the computer equipment (that was rarely or not used, and quickly became out of date) and software development (learning platforms) without previously planned and assured teacher training for its use (Centre for Educational Research and Innovation, 2001; Balazs, 2017).

Favorable results related to the participants' interest for professional development are more than evident. Namely, teacher interest in professional development is higher than their assessment of available opportunities for participation in these programs. This finding is strongly reassuring as it may indicate respondents' positive attitude toward professional development despite the fact that they lack financial resources to meet the increasingly complex demands placed on them. Empirical studies (Balazs, 2017; Cepni, Tas &

Kose, 2006) conducted in the educational systems of countries in the region show similar trends.

Concerning the teachers' needs for professional development in the area of educational ICT, the study results indicate that more than half of the study respondents recognize the necessity for conducting professional development trainings focused on smart board technology. One-third of the study participants pointed out the need for training centered around LMS and web development platforms. Finally, the overall research findings suggest that university teachers need comprehensive support for the implementation of ICT in teaching in order to maximize the affordances of the existing ICT infrastructure in higher education institutions in the Republic of Serbia.

### CONCLUSION

The increasing number of ICT devices and tools and their availability to students and teachers open up a multitude of opportunities in higher education. However, at the same time, they introduce new challenges that need an adequate response. To make the use of ICT in higher education a success requires a balanced approach between the acquisition of hardware, permanent technical support and support focused on developing teachers' digital skills and competencies through professional development programs.

The overall study findings call for a profound change in the application of ICT in instruction, in a way which emphasizes the planning process which implies a re-thinking of and setting clear goals and objectives, rather than merely focusing on the usage of diverse ICT tools (High Level Group on the Modernisation of Higher Education, 2013). What is currently missing is a comprehensive strategic document that would address the needs in higher education for further enhancement of the available academic capacities and infrastructure development. This document should also address current needs, define specific measures and activities within different geographical regions and scientific fields as well as in each of the areas of educational policy (e.g. curriculum development, leadership and governance, professional development). Educational technology might have a more substantial impact if the policies and programs concerning the application of ICT in education are conducted as coordinated support of a change of all components of the educational systems (UNESCO, 2011).

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## СПРЕМНОСТ НАСТАВНИКА ЗА ПРИМЕНУ ИНФОРМАЦИОНО-КОМУНИКАЦИОНИХ ТЕХНОЛОГИЈА У ИНСТИТУЦИЈАМА ВИСОКОГ ОБРАЗОВАЊА

Данијела Шћепановић<sup>1</sup>, Исидора Корач<sup>2</sup>, Бојан Лазаревић<sup>3</sup>

<sup>1</sup>Министарство просвете, науке и технолошког развоја, Београд, Србија

<sup>2</sup>Висока школа струковних студија за васпитаче и пословне информатичаре „Сирмиум”, Сремска Митровица, Република Србија

<sup>3</sup>Универзитет у Флориди, Колеџ за образовање, Гејнсвил, Флорида, САД

### Резиме

Развој информационо-комуникационих технологија (ИКТ) и повећан обим услуга у области отвореног онлајн-образовања нуде низ могућности, али и представљају изазов за високо образовање. Ефикасна примена ИКТ у настави подразумева не само обезбеђивање потребне рачунарске опреме већ и испитивање потреба корисника, континуирану техничку подршку и одређене компетенције наставника. Бројни званични документи из области образовања који се баве анализом начина на које се ИКТ примењује у наставној пракси указују на недостатак дигиталних компетенција наставника. Да би успешно применио ИКТ у настави, наставник треба да влада основним рачунарским апликацијама (обрада текста,

табела, базе података, складиштење и руковање информацијама), да уме да креира подстицајно онлајн-окружење за учење, да примењује ИКТ за сарадњу, умрежавање и колаборативно учење са колегама.

У раду се разматрају различити ставови наставника у вези са применом ИКТ-а у настави у установама високог образовања, као и потребе за стручним усавршавањем у овој области. Разматрају се следећа истраживачка питања: 1) Како наставници процењују приступ ИКТ ресурсима у оквиру њихове образовне установе?; 2) Коју образовну технологију и софтвер наставници користе током наставе?; 3) Како наставници процењују свој професионални развој и учешће у развојним ИКТ пројектима?

У истраживању је учествовало 211 наставника запослених у установама високог образовања на универзитетима у Београду, Новом Саду, Крагујевцу, Новом Пазару и Нишу. У складу са сврхом истраживања, осмишљен је упитник са питањима отвореног и затвореног типа.

Налази истраживања указују на то да наставници препознају потребу примене ИКТ-а у наставном процесу, док је њихова процена приступа ИКТ наставним материјалима различита, у зависности од приступа технологији и ИКТ услугама. Утврђено је да је ниво практичне примене ИКТ-а у учионици и даље осредњи или релативно низак. Када је у питању употреба софтверских решења у настави, налази указују на то да преовладава примена основних софтверских решења као што је MS Office, а потом примена система за управљање учењем. Резултати несумњиво показују да су испитаници заинтересовани за професионални развој. Тачније, заинтересованост наставника за професионални развој виша је од њихове процене о постојању прилика да учествују у овим програмима.

У закључним разматрањима указује се на потребу израде свеобухватног стратешког документа који би одговарао потребама високог образовања за даљу изградњу инфраструктуре, институционалних и професионалних капацитета, као и низ мера у области осигурања квалитета онлајн-образовања.

## RELEVANCE OF TRANSLATION IN ESP TEACHING METHODOLOGY

Nadežda Stojković\*

University of Niš, Faculty of Electronic Engineering, Niš, Serbia

### Abstract

This paper offers an observation and discussion on the relevance and scope of presence of translation within English for Specific Purposes courses in academic settings of the Faculty of Electronic Engineering and Faculty of Medicine, University of Niš. There is concern with methodological issues of translation skills regarding domain terminology. This subsumes translation methodology, finding precise target language equivalents, as well as determining whether to translate a text, respecting the syntax of the target language, or to paraphrase it with the primary aim to most precisely convey information contained in the original. The main argument and the issue of the survey conducted with the students of both faculties is direct correlation between translation, or absence of it for that matter, and the cognition of the domain content taught. Then, there is an emphasis on a wider social context that implies inducing in students the awareness of the responsibility they as future professionals and experts in their field have towards their own mother tongue in the dissemination of content knowledge. It is common in the Serbian scientific and professional environment that the translation of scientific texts in English is done by domain experts without consulting linguists, philologists of Serbian language. The consequence is mere (and often incorrect) transliteration of English scientific terminology, and ultimately uncurbed influx of foreign terminology. Yet another argument on the relevance of the previous one is that translation enhances soft transversal skills such as thoughtfulness and critical thinking which among others benefit comprehension of the domain knowledge, as it has been noted that professors, and then students use the English terminology while speaking Serbian, where the latter group do not fully understand the content presented in such scientific 'newspeak'. The paper presents concrete teaching practice which has for its goal inducing the students with cautiousness when choosing professional terminology in either language.

**Key words:** translation, paraphrasing, equivalents, transliteration, social responsibility.

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\* Аутор за кореспонденцију: Надежда Стојковић, Електронски факултет у Нишу, Александра Медведева 14, 18000 Ниш, Србија, [nadezda.stojkovic@elfak.ni.ac.rs](mailto:nadezda.stojkovic@elfak.ni.ac.rs)

## ЗНАЧАЈ ПРЕВОЂЕЊА У МЕТОДИЦИ НАСТАВЕ СТРУЧНОГ ЕНГЛЕСКОГ ЈЕЗИКА

### Апстракт

У овом раду разматрају се важност и заступљеност превода у настави стручног енглеског језика на Електронском и Медицинском факултету Универзитета у Нишу. Прво се разматрају методичка питања везана за развој вештине превођења стручне терминологије, налажење прецизног еквивалента, као и одлучивање да ли да се текст преведе поштујући синтаксу оригинала или да се парафразира са основним циљем да се најпрецизније пренесу информације садржане у оригиналном тексту. Затим се анализира шири друштвени контекст. Инсистира се на томе да је важно студентима усадити свест о њиховој сопственој одговорности као будућих професионалаца и експерата према употреби матерњег језика при дисеминацији научних садржаја. У нашем научном и професионалном окружењу превод научних текстова са енглеског језика често раде сами научници без консултовања филолога за српски језик. Последица тога је једноставна транслитерација научне терминологије преузете из енглеског језика, те неконтролисани уплив страних речи. Још један аргумент који појачава значај претходно наведеног је да превођење унапређује друштвене и менталне вештине и да доприноси бољем разумевању самог научног садржаја. Примећено је да професори, а затим и студенти користе енглеску терминологију док причају српски, при чему студенти не показују пуно разумевање материје представљене тим научним „новогвором“.

**Кључне речи:** превођење, парафраза, еквивалент, транслитерација, друштвена одговорност.

### *TRANSLATION OF SCIENTIFIC CONTENT INTO SERBIAN*

Translation in English for Specific Purposes (ESP) (equally so in Languages for Specific Purposes) is of crucial relevance, grounded in the fundamental rationale of this particular form of English Language Teaching (ELT), that being international expertise dissemination of the practice community. This dissemination is a two-way process, the experts not only conduce their findings on the particular professional/scientific domain in question to the scientific audience worldwide via the medium of English language, but they are also the first recipients of that kind of knowledge coming from other practice communities, and are those able to comprehend the novelties thus transmitted. That being the case, it is most often them, rather than professional translators or linguists in general, who offer an equivalent term in their mother tongue. This way, professionals and/or scientists are knowledge mediators who take upon themselves the role of facilitators in understanding specialized texts and terminology for the scientific and technical audience (Newmark 2006).

The two identifiable reasons why specialized terminology is not translated and why consultancy of trained translators is not sought, is the following. First, the development of science today is undeniably fast, especially in areas of information technologies (IT) and medicine. The

breakthroughs in those sciences are presented in scientific journals and have immediate dissemination and consequent application in theoretical knowledge and practice. Put in simple terms, there is no time for translation. A concurrent reason is that dealing with science implies utmost necessity for precision which is secured if practicing scientists use the very same terms thus avoiding any possibility of obscurity of meaning or ambiguity. There are areas of practice that must necessarily rely only on English as a medium of communication, and one of the most representative ones is air traffic control, exemplifying those fields where the need for utmost precision in communication is imminent. Yet, those although unquestionable, are not to be considered a justification for not translating throughout various professional and scientific communities, but are rather to be clearly distinguished from fields where translation is possible and beneficial. It is here that the other possible reason for translators not being introduced and actively involved in transferring new and existing scientific knowledge into Serbian can be observed and ascribed to the absence of awareness of the wide relevance of linguistic issues involved.

When professionals, university professors provide the equivalent they most often just use the very English term itself yet pronounced with Serbian sounds. Therefore, there is extensive linguistic borrowing in the form of transliteration. However, often even this transliteration is approximate as depending on the amount of knowledge of the professor who starts using the particular term. One such example is the concept of 'fading' in telecommunications that in Serbian is 'feding'. After numerous doctoral theses proposed for defense at the aforementioned faculty that in their title contain 'feding', the author insisted the colleagues find how it appeared instead of 'fejding'. They traced back the person who introduced the term, who was the first to start dealing with that concept, and found it was a professor who used to pronounce that word as /fedinj/ and so transcribed it and initiated its use as such in Serbian.

As the developments both in the fields of electronics and medicine are overwhelmingly numerous and fast, the number of new terms is high. Also, the scientific literature is primarily in English. Even Serbian scientific journals, all such issued by the University of Niš for example, are published in English. Being so much exposed to this language, the professors tend to use English terminology in lectures as well, and to a large extent. The amount to which English terminology pronounced in Serbian is used can be observed with students who when in English classes do English to Serbian translation speak some new kind of Serbian language in which nouns, verbs, even some adjectives and adverbs, though with Serbian inflexions, are actually English words with just auxiliary verbs being Serbian. When a student translates in such way, the author asks for actual Serbian equivalents, or asks for a clarification in Serbian. For instance, when asked for a referent of 'rapidno', 'sekvenca',

‘freim’, ‘raster’, the students far too often do not know, in this way illustrating incomprehension of the content matter even in their mother tongue, which is a serious consequence of such indiscriminate, direct use of foreign words.

### *METHODOLOGY OF TRANSLATION IN ESP COURSES*

Translation as claimed here to be of high relevance is valid at more advanced levels of ESP instruction where students possess at least intermediate level of English language proficiency. Then, it is considered the fifth, highly important skill (Munday 2001). Since language learners involved are not English language majors and do not possess theoretical linguistic education, they need to be introduced into why translation matters in their field of expertise, and then what kind of translation they need to deal with. This excludes theories and practice of translation as students of language majors are to master. The type of translation that domain specialists are to know and to practice is functional-semantic translation (Nord 1997). Translation in ESP training is relevant for two reasons: 1. it facilitates comprehension of specialized texts (Reiss 1989); 2. students need to be able to relate lexis and structures of target language into their mother tongue equivalents (Nord 1997). Students are to be presented with the relevance of translation and their own social responsibility as regards the spread of the knowledge both to the worldwide and domestic scientific and practice community in the way that allows for its complete comprehension.

When introducing work on translation in class, the author found it useful to first discuss this skill with students, why or if it is needed, and in what form. During such conversations there always, expectedly, arises the undeniable fact that their communities of practice (IT and medicine) are becoming ever more international and therefore do require an imminent bridge language. Next, due to that, students’ perception is that technical-scientific text types are exclusively denotative and inexpressive. This is the first point that needs to be unveiled. It quite understandably reflects what in ESP theory is considered a fossilized misapprehension about the nature of scientific discourse, the preconception that there are expressive (usually associated with literature) and technical-scientific texts which are mutually inherently different. Whereas the former would require complex translation to achieve all the nuances of meaning and style, the latter is presumably straightforward and requires precision in one-to-one equivalents (Zheng, 2017).

Students need to be faced with their (future) role as knowledge communicators and knowledge mediators of the social practices they are agents of. Therefore, preceding translation, there is work on domain texts (spoken and written) and their linguistic features (lexical, grammatical, syntactic, morphological, stylistic), that is, getting students to recognize

discursive features of the relevant discourse community. They are to realize the direct interconnection between linguistic communication and social practices. When commencing work on translation with ESP students, overcoming the preconceived, yet uninformed notions of how translation is to be done is crucial (Nord 1991). Future professionals (of IT and medicine for this matter), unlike students of linguistic majors, are not familiar with the basic premises of translation, that one-to-one correspondence is impossible as formal and semantic differences between two languages are the barriers. Instead of a misconception that there can be only one correct rendition of the source text (insistence on exactness inherent in hard sciences students profiles), they need to reconceptualize their idea of the relation between the source and target text as proper in a functionally apt way (Vermeer 1986, 33), beyond mere transcoding of words and sentences, the approach that is characteristic of instrumental translation (Nord, 2002).

Therefore, students are to distinguish between two kinds of translation needed in scientific and professional settings, precise translation where the carrier of meaning is mainly specialized domain terminology, and translation that is a paraphrase that conveys the exact information of the source text, yet does not need to closely follow its structural flow. They are to internalize the notion of translation as a facilitating means of interlingual functional exchange of information, and that to achieve it, the source and target texts need to have an identical communicative value not regarding the form, but content. This is a knowledge communication approach to translation that is employed where context is the reference point of equivalence.

### *TRANSLATION AND COGNITION SURVEY*

Significantly long teaching practice within the area of ESP of the author, some twenty years, have provided ample understanding into the essential correlation between the relevance of translation and its very purpose of comprehension of concepts they denote. Namely, our thesis is that translation matters not only in ESP classes, but we dare say even more importantly for students' comprehension of the professional content that is transferred through professional terminology. What started as a far too frequent situation observed in classes was proven a fact in two simultaneously conducted surveys at the Faculty of Electronics and Faculty of Medicine, University of Niš. The author, the ESP lecturer at both faculties, repeatedly asked students to translate the Serbian-English transliterated words into another Serbian word, to provide synonyms, which students would most often fail to do. It was evident first to the lecturer, and then through conversation to the students themselves that this inability has profoundly serious implications. Students would then become aware that they do not understand the content matter of their

courses. This was a huge discovery for them when faced with the harsh reality of it.

In the academic school year 2018/19 the author conducted a descriptive, open questions survey with the students of both faculties to inquire about their insights as to why the situation is that grim. At the Faculty of Electronic Engineering, the survey was taken by 43 students at year three, and at the Faculty of Medicine, 17 students at year one. The survey had six questions and students were asked to present their opinions on them in short. The survey was conducted at the beginning of the autumn semester, very soon after the beginning of the course.

*Survey questions:*

1. *Is translation of professional and/or scientific terms into Serbian relevant?*
2. *Why yes/no?*
3. *Does the use of Serbian terms help or hinder your professional communication?*
4. *Who/what are your 'models' for using Serbian/English terminology when speaking Serbian?*
5. *Should there be a standardized way of using English terminology?*
6. *If yes - who should be responsible for standardizing foreign professional and scientific terminology?*

Before proceeding into the insights gained from students' responses, it is illuminating for this argumentation to explain that the author finds these descriptive, free form answers surveys most useful for her own teaching practice, rather than those that require statistical analysis of the results, yet not denigrating the latter in any way. Rather, for the perception and the sentiment of the author, this type of survey yields answers that she can directly use to enhance her teaching practice. Among students' answers there are often extraordinarily wise and creative ideas that truly are indispensable for improving the teaching practice and tailoring it more adequately to students' needs, as well as the actual requirements of the given time and setting.

Thus, in this particular survey the following was found:

1. There were 57% of students who answered yes, and 43% said not relevant.
2. Here most revealing answers were mostly of the following kinds:
  - It is important because in that way we preserve our mother tongue.
  - We need Serbian terminology because we speak in our country, when we are abroad we can speak English. France and Croatia take care of their native tongues.



- English helps us communicate with everyone in our field, terminology should be in English so that we can freely talk with our colleagues at work here. If we use Serbian words we cannot understand each other fully because we perceive Serbian equivalents differently.
3. There were 54% students who claimed that translated terminology in Serbian makes them feel confused and said it should not be used because of that. The remaining number of students pointed out that Serbian terminology helps them better understand the subject matter in the domain field only when it is properly translated.
  4. This question was answered – according to professors by 84% of canvassed students. The rest answered vaguely, according to media, internet, journals.
  5. Total of 97% students agreed that terminology should be standardized officially.
  6. The answers here were 75% said that terminology standardization should be done by professors and scientists because they know what it means. There were 19% of students who said professors of English language, and 6% said professors of Serbian language.

These conflicting numbers clearly indicate discrepancies in opinions in students themselves. Here it is important to acknowledge that the survey was intentionally conducted at the beginning of the term, before students had enough time to comprehend themselves why and how translation assists their cognition. During the course and numerous situations through which the author intentionally guides students, they learn about the language in its wider context – to include questions of deep understanding, social responsibility and adequacy. The rationale for the survey was to prove to the author the necessity of inducing in students the awareness of using precise, approved Serbian terminology.

The work on understanding relevance of translation in professional discourses implied dealing away with the following widely spread misconceptions: 1. Anyone who speaks a language can automatically translate anything; 2. Translation is just a word-for-word adaptation of the original, in another language. Instead of these stances, together, through deduction, we would come to the following notions: 1. Translators are experts in specific fields of scientific language; 2. Translation is not just about words, but also concepts that lie underneath. The translation and cognition of concepts develop in synchronization. Translation transfer is a complex cross language activity and an integration of various disciplines included in that process. Sometimes, satisfactory translation implies the process of reformulating, rewording, or paraphrasing - also known as intralingual translation, which often is the case in hard sciences and students should be aware how to apply it.

### *SOCIETAL IMPLICATIONS*

The rationale for greater inclusion of translation practice in ESP classes in the courses English for IT and English for medicine at the University of Niš is the perceived need for accommodating students with easier and more profound understanding of the content matter, and inducing in them the awareness of societal linguistic consequences of their professional practice. Students of these two particular scientific fields will soon be the first recipients of new forms of those domains advances, and thus the first to disseminate it further. For that, they need to be equipped with directions as to how to use that new incoming terminology (Nord 1997).

Through discussing with students their perceptions of the professional terminology as mostly now used, merely transliterated into Serbian, they come to their own conclusions as to how that impacts (their own) comprehension of the matter, and at the same time, what happens to our mother tongue, if that large influx of new words, and in such a form, is justifiable. This kind of work on translation issues in professional domain language bears one more significance. Students know full well they need English language for mastery in their careers. Yet, with this practice, they start to perceive language as not just a taken for granted tool, but a field of rational comprehension and expression in which they are not passive recipients, but active in their responsibility towards it due to their professional expertise and their awareness of the role of languages, both English and Serbian.

The work on that awareness was carried out throughout the semester in the form of discussions with students, as open questions that implied the application of deductive logical thinking. The author, in her teaching methodology firmly believes that deduction is the most beneficial format of inducing knowledge in students. Thus, there were occasional discussions, when it was appropriate and associative with the unit that was done in class, regarding each of the issues raised in the survey.

The students of both faculties deal with hard sciences and it is rightful to assume they are not closely informed with the issues of language standardization and its relevance. Then, it must also be acknowledged that there is a highly sensitive situation in Serbian language regarding actual standardization of contemporary scientific terminology. As remarked in the Introduction, we are at present witnessing lack of cooperation, or rather lack of even an incentive for cooperation, between Serbian linguists, English language professionals and domain science experts. To our understanding, this leaves domain experts 'on their own' when it comes to the question of which form of the word to use, the original yet transliterated, or some Serbian equivalent. Here we say 'some' precisely because there is no standard instruction on finding most suitable translation and even more importantly, no channel of entering that translation into a uniform use

throughout the country. Such a situation reflects heavily on students' use of foreign terminology, and explains the contradictory result numbers of the survey.

The aim of the discussions in class are intended to introduce students with the notion that a truly educated professional, a well-rounded, mature person, needs to be actively aware of the language they choose to use. Students exhibit high interest in these discussions and are eager to grasp the relevance of very questions set since they know that English is the language of their sciences, respectively. Through those talks in which they all participate freely with stating and defending their opinions on each of the questions from the survey, they begin to learn, first of all, the very relevance of raising those questions, which for the author is the ultimate goal. We are of the opinion that these broad issues that implicate various stakeholders in the society cannot be remedied easily, as an intricate societal consensus is needed. What we find a real, feasible contribution to that social dialogue, is making future professionals aware how to use their professional language carefully. It will be up to them to consider whether to use foreign words in their mother tongue, or use the existing corresponding words which satisfy all the relevant nuances of meaning of the domain term in question, or to consult Serbian language professional linguists for advice. This can be a step forward in educating engineers and medical doctors towards them having broader vistas of the overall societal impact of their work.

Finally, we need to stress out emphatically once again that this is an example from teaching practice in which a specific issue was observed as repeatedly hindering cognition on the part of the student and being closely related to the unsolved situation with translation standards of English professional terminology in Serbia. The attempted, and we are free to say, achieved goal of the author was to make students aware to carefully choose the term in either language, to check if they themselves fully comprehend the concept it designates and to feel responsible for both their mother tongue and the advancement of their professional community.

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## **ЗНАЧАЈ ПРЕВОЂЕЊА У МЕТОДИЦИ НАСТАВЕ СТРУЧНОГ ЕНГЛЕСКОГ ЈЕЗИКА**

**Надежда Стојковић**

Универзитет у Нишу, Електронски факултет, Ниш, Република Србија

### **Резиме**

У овом раду разматрају се важност и заступљеност превода у настави стручног енглеског језика на Електронском и Медицинском факултету Универзитета у Нишу. Прво се разматрају методичка питања везана за развој вештине превођења стручне терминологије, налажење прецизног еквивалента, као и одлучивање да ли да се текст преведе поштујући синтаксу оригинала или да се парафразира, са основним циљем да се најпрецизније пренесу информације садржане у оригиналном тексту. Затим се анализира шири друштвени контекст. Инсистира се на томе да је важно студентима усадити свест о њиховој сопственој одговорности као будућих професионалаца и експерата према употреби матерњег језика при дисеминацији научних садржаја. У нашем научном и професионалном окружењу превод научних текстова са енглеског језика често раде сами научници без консултовања филолога за српски језик. Последица тога је једноставна транслитерација научне терминологије преузете из енглеског језика, те неконтролисани уплив страних речи. Још један аргумент који појачава значај претходно наведеног је да превођење унапређује друштвене и менталне вештине и да доприноси бољем разумевању самог научног садржаја. Примећено је да професори, а затим и студенти користе енглеску терминологију док причају српски, при чему студенти не показују пуно разумевање материје представљене тим научним „новогovorом“.

## STUDENT LEADERS ON BOLOGNA PROCESS IMPLEMENTATION – ADVANTAGES, SHORTCOMINGS AND PERSPECTIVES

Jelena Gajić\*, Marina Savković, Dušan Borovčanin

Singidunum University, Belgrade, Serbia

### Abstract

Almost two decades after the implementation of the Bologna Process in higher education around the world, the question of the applicability, justification and effectiveness of reforms implemented globally arises. The aim of this paper is to explore the attitudes, optimism versus pessimism, more precisely student representatives' "mood" regarding the implementation of the Bologna Process and Bologna tools. The overall sample consists of student representatives from 17 European Higher Education Area countries. The results of the research should be a step towards further higher education reforms, or, more precisely, a proposal to modify the existing plans, bearing in mind the different conditions and characteristics of the countries where they are implemented and their willingness to accept the reforms. The results indicate that mobility, diploma supplements and quality assurance are the most positive aspects of BP and employability, the social dimension and the financing model of higher education are weak points of BP.

**Key words:** Bologna process, higher education, student leaders, shortcomings and perspectives.

## ПРИМЕНА БОЛОЊСКОГ ПРОЦЕСА ИЗ УГЛА СТУДЕНТСКИХ ЛИДЕРА – ПРЕДНОСТИ, НЕДОСТАЦИ И ПЕРСПЕКТИВЕ

### Апстракт

Након скоро две деценије од почетка примене Болоњског процеса у високом образовању широм света, поставља се питање применљивости, оправданости и ефикасности спроведених реформи на општем нивоу. Циљ овог рада је да се истраже ставови, оптимизам/песимизам, тачније „расположење“ студентских представника у вези са применом Болоњског процеса и инструмената. Укупан узорак чине студентски представници из 17 земаља Европског простора високог образовања. Треба-ло би да резултати истраживања буду путоказ даљим реформама високог образова-

\* Аутор за кореспонденцију: Јелена Гајић, Универзитет Сингидунум, Данијелова 32, , 11000 Београд, Србија, [jgajic@singidunum.ac.rs](mailto:jgajic@singidunum.ac.rs)

ња, односно предлог модификације постојећих планова, имајући у виду различите услове и карактеристике земаља где се спроводе, као и спремност за прихватањем реформи. Резултати спроведеног истраживања указују на то да су мобилност, додатна диплома и осигурање квалитета најпозитивнији аспекти Болоњског процеса, а запошљивост, социјална димензија и финансијски модел високог образовања су слабе стране Болоњског процеса.

**Кључне речи:** Болоњски процес, високо образовање, студентски лидери, недостаци и перспективе.

## INTRODUCTION

The establishment of the European Higher Education Area (EHEA) was supported by the government, which is primarily interested in the impact of higher education co-operation on economic growth (Cippitani, Gatt, 2009). Furthermore, higher education institutions are interested in improving quality and competitiveness (Klemenčić, 2019) in order to maintain the state's commitment to education as a public good, and to encourage students who emphasise the importance of equal opportunities, accessibility to higher education and student welfare as well as the employability of graduate students (through quality education).

Contemporary education development strategies are based on the concept of lifelong learning and the concept of a *'learning society'*. These concepts were developed by international organizations in the 1970s and 1980s; The OECD, UNESCO, ILO, the Council of Europe and the European Commission, which define international development and the role of education and recommend them to their members as a basis for conducting national education policies (Masen, 2007). These concepts and expectations should be realistic and they certainly depend on the results of the adaptation or reforms (Neave, Veiga, 2012) in the educational systems of countries, in order for these countries to respond to changes, and to the new demands by improving the quality of the educational environment.

The specificities of countries in transition indicate the need for a quality model that will allow them to be aligned with their legal, political and economic characteristics. Higher education quality research in the European Higher Education Area is particularly viewed from the perspective of students, and their opinions and attitudes (Milojević, Radosavljević, 2019; Gajić, Živković, Stanić, 2017; Klemenčić, Chirikov, 2015; Gajić, 2012) are crucial in determining the quality of the system and establishing its control. The European Students' Union (ESU) conducted a survey with 11 million students in order to evaluate the results of the Bologna Process (BP) from the students' perspective in 2009. The results indicate a lack of progress in many aspects of the process, and there is a strong similarity to the survey from 2007. (BWSE. 2009; 7-15). In comparison to the survey from 2009, Bologna with Student Eyes surveys from (BWSE) 2015 and 2018 show that BP has

become a higher priority for many governments, National Student Unions (NUS) and Higher Education Institutions (BWSE, 2009; 119).

As Klemenčić stated, the opportunity costs – both for individual students and our economies and societies – are enormous if higher education institutions do not fulfil their promise of formative effects on students (Klemenčić, Chirikov, 2015). This usually happens to be when institutions do not have a clear insight into what, why and how students learn and develop throughout their higher education. It is maybe too strong to say that we do not yet fully understand what is going on with students while they are enrolled in higher education as some authors argue (Klemenčić, Chirikov, 2015), especially if we know that student representatives have their legal representatives in Bologna Follow up Group. Ever since Prague Ministerial Summit in 2001., European Students' Union [ESU], the representative platform of the European national unions of students, has been granted a consultative membership and has participated in the governing structures of the Bologna process (Klemenčić, 2012). Therefore, the views and grades of student representatives are significant in order to realize the results of BP implementation and to make recommendations for further improvement of the process (Schomburg, Teichler, 2011; Kehm, 2010).

Comparing two series of 'Bologna with Student Eyes'surveys, in 2015&2018, we can notice a decline in the students' impression of the positive impact of the Bologna Process on the student participation in their countries. At the beginning of the implementation of BP, most participants were enthusiastic but today, only two of them consider BP as a driving force for students; 16 stated that there is some influence and 19 do not see any effect or very little (European Students' Union 2012, 2015; BWSE 2015, 2018).

However, the test should refer to whether or not BP is trying to ensure student participation.

### *SURVEY AND CONTRIBUTION*

The purpose of this research is to observe the progress and challenges of the Bologna process implementation and, through the attitudes of student representatives, indicate future development. The goal of this paper is to use the obtained results as inputs, recommendations for the modification or improvement of the Bologna process activities.

The online interview was conducted on the 30<sup>th</sup> European Students' Convention and PASCL Second Annual Conference in Brussels, Belgium (2015). Student representatives from 17 EHEA countries (Netherlands, Switzerland, Norway, Belgium, Spain, Cyprus, Germany, Denmark, Azerbaijan, Croatia, Slovakia, the Republic of North Macedonia, Italy, Portugal, Montenegro, United Kingdom, Czech Republic) were interviewed. The interview guide contained questions with 1-5 scale (1 – not satisfied at

all, 5 – fully satisfied), followed by open-end questions where representatives should give detailed answers and explain their gradings on the previous questions. The questions were related to the following elements of Bologna process implementation:

- Student participation in policy-making processes.
- The social dimension of the Bologna process.
- Quality assurance mechanisms implementation.
- Understanding and recognizing importance of ECTS concept.
- The contribution of the Bologna process to increasing mobility.
- Bologna process impact on employability.
- The financing model of EHEA.
- Optimism vs pesimism regarding further BP reforms.

The mainly qualitative method used and small sample in this research are seen as the basic limitations of the analysis. We tended to overcome them using a numerical scale for the answers and giving an overall grade for every analysed topic.

## *RESULTS AND DISCUSSION*

Traditional EU members are more satisfied with different aspects of the Bologna process (average rating of 3.21), compared to new EU members (2.85), according to summary results analysis of all the answers (using average of the 1-5 scale). If we exclude Italy, whose student representative was very critically oriented towards most of the aspects of the Bologna process (average rating of 2.00), traditional EU members are even more satisfied with the process (3.37). EFTA members are also satisfied above the average (3.33). Candidate countries and Azerbaijan had an average rating of 3.12.

Therefore, it is clear that new EU members are less satisfied than all other participants.

### *The Most Commonly Mentioned Reasons for BP-Related Satisfaction or Dissatisfaction*

The factors that affect student representative satisfaction vary depending on the origin of the student. For example, Dutch representatives base their positive attitude on BP on the assessment that most of the goals have been implemented and that students have the ability to influence the development of the process itself. In Norway, according to their representative, “*the significance and the design of learning outcomes are still not well understood at the grassroot level (students and academic staff)*”. The incomplete realizations of EQF and NQF are the reasons for the dissatisfaction of Czech respondents. The representative of Germany emphasized that the Bologna Process had not been adequately supported by the management of Higher Education Institutions (HEI) and professors while



the students from Slovenia did not notice significant changes except the new names of the subjects, which remained more or less the same.

Students from Spain said that *Bologna Process has been successful in terms of facilitating convergence and coherence with other European HE systems, that has enabled and facilitated the internationalization and recognition of academic knowledge*. However, the Bologna process implementation negatively affects economically disadvantaged students, since the tuition fees and lower student grants are some of the direct consequences of the Bologna process reforms.

Incomplete implementation in Croatia could be explained by the lack of management's and teaching staff's readiness to support changes in education. *"There are almost no students who get a job after graduation and there is an opinion that if you want to complete your education you need to get a master's degree. This is a consequence of the extremely poor organization of undergraduate and graduate studies - instead of shortening from four to three years of undergraduate studies (before Bologna studies), most HEIs actually extended four years to five (3 + 2), often, making postgraduate studies almost redundant."*

In the Republic of North Macedonia students remarked that there was no clear and precise measurement of BP implementation (similarly observed in Italy), and that Bologna is often seen as just a game for collecting ECTS.

Representatives of Cyprus, Montenegro, and Azerbaijan think that in their surroundings, BP is well received, students are completely familiar with the educational process, but at the same time they recognize more opportunities for progress. Danish students also rate the implementation of BP as successful, especially regarding structural issues, but they, however, claim that "challenges within the Social Dimension (SD) area still remain."

### *Student Participation in Policy Making Process*

Considering the sample level, it can be concluded that student representatives clearly notice the difference between what is "*written in the law*" and what is actually expected to initiate and revive those letters.

Most respondents positively evaluate student participation in the policy-making processes at the faculty and university levels. Students' representatives from Norway, the Netherlands and Croatia expressed the highest degree of satisfaction. The representative of the Netherlands notes the importance of the partnership between students and the Ministry of Education. In Norway, legislation provides at least 20% of student participation in all institutional bodies. Student participation in Croatia depends largely on the level of motivation and personal capacity of student council members. There is also a law in the Czech Republic that guarantees student participation at the national level in the decision-making processes; in Cyprus, the Student Union is the body that enables

participation, and the situation is similar in the Republic of North Macedonia. However, all representatives, almost equally claim that students are present, sometimes "visible" but most often "not heard" - at least not to the extent that they think would be optimal. Respondents from Slovenia, Azerbaijan and Montenegro share this attitude (expectating a new law on higher education, the representative of Montenegro shows a little more optimism and enthusiasm).

The common issue for most of the participants in our research is the observation that at the national level there is insufficient space for their influence and voice. Some are very critical and precise in addressing responsibilities (Spain: "... *in recent years, our government has marginalized and criminalized student movements, because of their political interests...*"), others are somewhat milder but with a similar attitude (Denmark, Slovakia, UK, Germany). Respondents also recognize the other side of the problem, the need for all students to become more active and engaged more seriously (Italy: "...*most students do not even know what Bologna is*").

Compared with the results from BWSE 2018, there is a notable decrease in student participation (19 representatives stated that there was little or no effect, 16 that there was some influence, and only 2 considered BP as a positive driving force for student involvement). In 2015, there were 10 unions and in 2012, 14 unions saw a significant positive impact on student participation. In 2018, there was a notable decrease considering the number of students participating in negotiation and brainstorming and student voice/participants in more informal arrangements. Many respondents were not satisfied with the transparency of the selection procedures of choosing student representatives ("*they are not adequately informed or selected*"; France). In Italy, student representatives are constrained during the decision-making processes even though they hold seats on boards and senates; in Norway, students are satisfied with their participation in decision-making bodies but they want to improve participation in preparatory work (BWSE, 2018).

### *Positive Sides of BP Implementation*

According to student representatives, mobility enhancement is seen as the most positive result of BP (average grade 3,63). Although all respondents think that mobility is enhanced, their perception regarding the role of ECTS and recognition possibilities vary. In some cases, ECTS and recognition procedures are well-developed and stimulate further mobility of students (Netherlands, Cyprus). Some respondents mention difficulties of interinstitutional diploma recognition as the main barrier for student mobility (Norway, Germany, and the Czech Republic). There are noticeable differences among universities related to the intensity of student mobility (Italy). Respondents also mention universities which intentionally have restrictive recognition procedures, so they could control incoming mobility (the Re-

public of North Macedonia, the Czech Republic, Denmark). In some cases, socio-economic backgrounds of students and relevant information accessibility still make a difference (Spain, Croatia, Portugal, the Republic of North Macedonia).

In some counties, the influence of Bologna on intensifying student mobility was extremely recognizable and advanced - in Montenegro, they are satisfied with mobility emphasizing it as a completely new experience; in Slovakia and Slovenia more students are using the term "privileged" students as they have this possibility.

Both students and staff mobility should be focused not only on numbers but also on the quality of mobility, which requires investments in IT, language learning for both international and local students (BWSE, 2018) monitoring mobility experiences, in order for the recognition and evaluation processes to operate fairly and for balanced mobility to flow. The Erasmus programme has been the source of funding for the mobility of up to 4.3 million young people between 2007 and 2016 (European Commission, 2018). European mobility programs have been intensively compared to those of 2008, so it can be said that education may not have been introduced at the national level as a public good, despite certainly being one.

Diploma supplements also seen as one of the successful points of BP implementation (3,53). Good progress in the implementation of DS has been recorded since 2015 ("...one of these aspects has not been fulfilled and one country has not yet introduced the Diploma Supplement) (European Commission/EACEA/Eurydice, 2018, p.126). Compared to early stages of BP implementation (Klemenčić, 2006), quality assurance system is on a well-developed level (3,32).

Regarding the accessibility of recognition of qualifications and credits, and the transparency of procedures, the situation slightly improved in 2018 if we are talking about automatic recognition. Students considered the lack of trust in validation procedures as the main obstacle to the development of recognition of prior learning, and it is probably a signal that indicates the necessity for reliable, detailed and transparent procedures (BWSE, 2018).

Most respondents agreed that the Quality Assurance (QA) mechanism had been fully or substantially implemented. In 2018, some kind of stagnation in the QA progress was recorded, even though the majority of students participated in internal and external QA and improving the quality of this involvement should be the required. The lack of information, transparency and the absence of relevant training were mentioned as the main barriers for students' involvement in QA process (BWSE, 2018).

Regarding the priorities of the Bologna process in the future, the European Students Union realize that *the implementation needs to be is of highest priority for the next period (2018-2020) followed by Student*

*Centred Learning (SCL) and Social Dimension (SD) of higher education* (<https://www.esu-online.org>).

### *Potentials for Improvement*

If we consider the particular aspects of Bologna process implementation, the lowest rating was given to the BP impact on employability (2.47). Student representatives think that BP does not have any influence on employability at all (Netherlands, the Czech Republic, Italy, Azerbaijan), or they are not informed about potential research on the topic (Germany, Norway). There are opinions that the Bologna process has destroyed the traditionally well-developed higher education system, so it has a negative influence on employability and labour market perspectives of young people (Croatia). The seemingly negative impact could be the result of a long economic recession, so it is difficult to measure BP's isolated influence on employability (Denmark). At the same time, there is a strong belief that BP has had an indirect positive impact on employability through transversal skills development and enhanced mobility for education and work (Spain and Cyprus).

Due to the long economic recession, the crisis of the national economy has been affected by unsatisfactory levels of student employability (Montenegro, Slovakia, Slovenia). “... *in natural sciences, the situation is good, students can easily get a job. But with social sciences it is a much more difficult situation, there is a ban on employment in state institutions, there are many austerity measures in place. BP would have to focus more on practice and be more closely connected with the economy.*”

It can be said that there are still problems in policies promoting gradual employability and it is necessary to improve university cooperation with the labor market (European Commission/EACEA/Eurydice, 2018) to use labor market predictions, to engage employees in planning curricula, to provide incentives to include work placements in higher education programs, to improve career development centers, to encourage/motivate student mobility and the implementation of Bologna tools (European Commission/EACEA/Eurydice, 2018. p.240).

The Social Dimension of the Bologna process was also rated low (2.79). Although in some cases everyone has access to higher education (Cyprus), student representatives move the focus from accessibility to retention, which is the challenge that keeps social inequality unchanged (UK). Students have some social and economic privileges (Slovenia), but the social dimension is not a priority of the Bologna process, so nothing or not much has been done in this area (Belgium, Norway, the Czech Republic, Montenegro). In some cases, national grant systems have been deteriorated by BP (Netherlands), since economic recession has additionally worsened the position of students from low participation backgrounds (Spain). The result of the aforementioned challenges is that re-

sources are still not spread equally (Slovakia). Almost all student representatives agree that it should be greatly improved, including representatives who are relatively satisfied with social services for students in their country (Germany, Azerbaijan, the Republic of North Macedonia and Portugal). The most dissatisfied with this issue were the representatives of Italy.

The fact that the social dimension is recognized as a crucial issue within BP has not led to intensifying activities in order to make positive changes regarding this issue. Compared to the results from 2018, there are similar situations; 15 countries (out of 43) consider the Social Dimension as a high priority for HEI. Comparing 2015 and 2018, seven student representatives stated that *"nothing has changed"* during these years, and some of them (Poland, Iceland, Switzerland, Hungary, Belgium, Belarus and Ukraine) stated that SD is a low priority or not a priority at all; and only Denmark stressed that *"it got worse"* (BWA 2015, 2018).

As for the social dimension from Prague Communiqué (2001) to the Yerevan Communiqué (2015), even though it is one of the most important tools, only a few countries had taken action to improve the conditions underrepresented groups to access and complete higher education (European Commission/EACEA/Eurydice, 2018, p. 214).

Most respondents were not satisfied with the financing model of EHEA (2,84). Being financed mainly on national levels, higher education institutions get the funding according to the number of students, not for the quality knowledge acquisition processes and creativity enhancement (Norway, Croatia). *"Education must be free for all students, no matter where they come from. Until then, we cannot support the financial model used in the EHEA. Everything is based on funding, as if universities were manufactories producing students..."* (Norway). There is an opinion that commitments made throughout the Bologna process were not fulfilled by the decision makers on national levels (Denmark). Student representatives stress very difficult situations in particular EU countries where investments in higher education are noticeably below the OECD recommendations (the Czech Republic), or in those countries where an obvious deficit of university autonomy is present (Croatia).

A trend of discrimination against students with lower socio-economic status, disabilities and towards employed students (BWSE, 2009, 8)<sup>1</sup> could be noticed, and it is still present.

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<sup>1</sup>Only a few countries have created National Action Plans as effective instruments addressing the social dimension within the EHEA. They have usually been made without the participation and contribution of the student population, and the most effective plans involve the active participation of students in order to improve socio-economic conditions.

*Some Bologna Tools Are Demonstrating Good Results Regarding the Creation of Equal European Higher Education Area (EHEA)*

Student representatives from different countries have similar opinions regarding the implementation of Bologna tools - everyone agrees that the implementation depends largely on the country as well as on the particular university. The representatives of the Czech Republic, the Republic of North Macedonia, Croatia and Denmark are almost unique in this view, while representatives of other countries mention some more specific examples:

*"Unfortunately, there is a lack of dealing with inequalities in investment in education, teaching and learning policies, the views of professors and academic staff."* (Germany)

*"Only a few countries have implemented Bologna tools correctly and systematically, others should be punished, perhaps excluded from the EHEA."* (Norway)

*"Diploma Supplement has not been implemented properly."* (Spain)

*The Contribution of National Quality Framework (NQF) to the Creation of a Compatible European Higher Education Area (EHEA)*

Regarding NQF, 73% of the total number of student representatives said that their countries had NQF. Students' attitudes from different countries vary considering their assessment of the importance of NQF in creating a compatible EHEA. In Germany, Spain, Azerbaijan, Montenegro and Croatia, students believe that this is the only and right way of development, while alternatives would require a large number of difficult bureaucratic procedures. Representatives from Belgium, Norway, Italy, Slovenia, Cyprus, Portugal and the Czech Republic are considering other approaches to the solution of creating a compatible EHEA. The Dutch representative insists on comparing grades and degrees.

*Understanding of the Concept of European Credit Transfer System (ECTS) by All Stakeholders in Higher Education (HE)*

According to our respondents, we can conclude that the attitude towards this issue is aligned with the level of the development of the state and society. Namely, there is a clear regularity - primary European members with stable economies (the views of the representatives of the Netherlands, Switzerland, Belgium, Denmark and Germany) are very similar, more precisely they have a positive attitude, estimating that everyone understands ECTS as they consider them logical and expected.

Other research participants show ambivalence (Spain), perceive inadequacy in implementation despite basic understanding (the Czech Republic, Norway), or give a "diplomatic" positive assessment with recommendations for additional efforts and further development (Cyprus,

Azerbaijan). Representatives of Slovenia and Croatia estimate that this is a "*pro-forma implementation*", i.e. that the concept is essentially not fully accepted. The most critical views come from the Republic of North Macedonia, Italy, Montenegro and Portugal. Student representatives believe that "*(almost) nobody understands anything, professors and academic staff, management of higher education institutions, students*".

#### *Optimism vs Pessimism about the Future of Bologna in EHEA*

Despite the previously mentioned criticism, unfulfilled expectations and estimates that many aspects of the process could and should have been more successful, most respondents expressed optimism about the future of BP (72,2% are optimist versus 27,8% pessimist).

Some respondents expressed their belief that they should continue along the same lines, with a particular focus on the segments that were shown to have been improved (Cyprus, Azerbaijan, the Republic of North Macedonia) and a continuous exchange of experiences (Slovakia). They also insist on the distinction among the significance, strength and reach of the concept itself, with respect to irregularities or failures of implementation (Croatia). The representative of Slovenia calls for more serious and comprehensive reforms "because only in this way can we provide a system that will be successful and long-lasting", while a similar view with more specific argumentation is made by the colleague from the Netherlands: „so many differences in understanding and implementation of BP in different countries will lead to a loss of patience for those who were the first in the implementation. They will lose interest, they will look for another platform, so something really needs to change. The Czech representative insists on a unique solution and serious consideration of the current situation at the European level.

Scepticism about the future development of BP is present and some states politicians are thought to view education as a business using the same instruments of governance and goal realization (Norway). The Bologna platform has been used for university education reforms that have nothing to do with it; students have no awareness of what Bologna is and what it means. The only precise benefit is increased mobility, but it cannot be enough (Italy). Finally, there are concrete expectations of the near future of BP as a focus on two priority goals: the advancement of the social dimension and Student Centre Learning (Spain).

### *CONCLUSION AND RECOMMENDATIONS*

Comparing the data from 2015 and 2018, we can notice that the same challenges for the implementation of Bologna reforms exist. The main challenges were the lack of resources, the lack of knowledge and the teachers' lack of interest. In this three-year period, some changes happened,

and in 2018, the main challenge was the teachers' lack of interest, then the lack of resources and then the lack of knowledge (BWSE, 2018).

It is obvious that reforms of the Bologna system are necessary if we expect the system to be successful and sustainable in the long run. Since reforms include time and effort from all parties in the field of higher education, cooperation among the state, HEIs and students in all European countries, play a significant role in the achievement of common goals. Knowledge economies and knowledge societies confirm that higher education has a public responsibility and is strategically important for the future of Europe.

The research of the attitudes of student representatives from the European Higher Education Area countries regarding the implementation of the Bologna Process and Bologna tools indicates that the reforms were implemented with only limited/moderate success. Weak points of BP implementation are its impact on *employability, the social dimension and the financing model* of higher education. *Mobility, diploma supplement and quality assurance* are seen as the most positive aspects of BP and confirm that many activities have been done in the past 20 years and those include free movement of students and young workers, internationalization and quality assurance standards improvement.

Overall, the perception of student representatives is that the cooperation among universities and EU-funded programmes are the most positive sides of the Bologna process. On the other hand, there is a lack of understanding and commitment on national levels related to BP implementation issues, so universities are faced with insufficient and inappropriate funding. The weak social dimension (European Commission/EACEA/Eurydice, 2018) of the Bologna process is also seen as "the guilty party" of the state and national policies. Finally, the connection of Bologna initiatives and employability is blurred.

As the results of the research show, reforms are not fully implemented in any signatory country. Moreover, there are a lot of cases where some of the reforms have been implemented partially and in form (Novaković, 2014), rather than in substance. But even though students are seeing many reforms fail, they still seem to be optimistic about the whole process. Certainly, the BWSE 2018 survey says that implementation must be the highest priority by 2020, followed by student-centred learning and the social dimension of higher education (paying attention to the BP implementation process itself rather than setting new goals), which opens space for further research in this area.



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## **ПРИМЕНА БОЛОЊСКОГ ПРОЦЕСА ИЗ УГЛА СТУДЕНТСКИХ ЛИДЕРА – ПРЕДНОСТИ, НЕДОСТАЦИ И ПЕРСПЕКТИВЕ**

**Јелена Гајић, Марина Савковић, Душан Боровчанин**  
Универзитет Сингидунум, Београд, Србија

### **Резиме**

Након двадесет година од потписивања Болоњске декларације, суочавамо се са различитим резултатима у поређењу са дефинисаним циљевима Болоњског процеса и напорима уложених у њену примену. Истраживање ставова високих студентских представника из земаља чланица Европске уније о примени Болоњског процеса указују на половичан успех спроведених реформи. Конкретно, 41% испитаника сагласило се да су све болоњске реформе спроведене, док се 40% њих сматра да спроведене реформе нису задовољавајућег квалитета. Главни изазови за спровођење Болоњског процеса су: отпор наставника у контексту спровођења реформи и промена, недостатак ресурса и недостатак знања/компетенција (BWSE, 2018). Резултати истраживања показују да је у контексту спровођења Болоњског процеса потребно унапредити: повећање фондова за инклузивнији приступ високом образовању у контексту обезбеђивања ресурса студентима лошијег материјалног статуса, успостављање структурне подршке за спровођење социјалне димензије студирања, примену концепта учења усмереног на студенте и целоживотног учења.

Мобилност, додатак дипломи и систем осигурања квалитета су најпозитивнији аспекти Болоњског процеса, док запошљивост, социјална димензија и национални модели финансирања високог образовања представљају слабу тачку Болоњског процеса. Могло би се рећи да фокус треба да буде на доследнијој примени усвојених образовних политика, учењу усмереном на студенте и социјалној димензији. Са друге стране, требало би избегавати усвајање нових циљева, као и додатних образовно-административних захтева и обавеза.

Због свега претходно наведеног, сматра се да владе, високошколске установе и друге организације треба да унапреде своју посвећеност примени Болоњског процеса и изградњи бољег међусобног разумевања и сарадње како би се постигло одрживо, инклузивно, висококвалитетно образовање широм Европе у европском простору високог образовања до 2030. године.

## THE ROLE OF ACTION RESEARCH IN PREVENTION OF VIOLENCE IN SCHOOLS - EXAMPLE OF REFLEXIVE PRACTICE

Jelena Maksimović<sup>1\*</sup>, Danijela Stojanović<sup>2</sup>, Jelena Osmanović<sup>1</sup>

<sup>1</sup>University of Nis, Faculty of Philosophy, Niš, Serbia

<sup>2</sup>University of Nis, Faculty of Arts in Nis, Niš, Serbia

### Abstract

The aim of the action research conducted is focused on professional training and creating a favorable climate in the classroom for the development of each student. The paper emphasises how important and efficient action researches are in improving teachers' reflective practice, as well as in providing support for its practical application. The research presented in this paper involved four stages of action research: teachers' training, creation and realization of activities, evaluation of teachers and students and of the complete programme, as well. The formative evaluation was done by means of the questionnaire for the assessment of the accomplishments of workshop activities and interview conducted with the teachers after each of the activity was completed. The summation evaluation was done by means of the questionnaire for the assessment of the initial knowledge of the students and the ultimate knowledge they acquired regarding types and forms of violence, and reacting to and reporting peer violence. Finally, third questionnaire was used for the self-assessment of the teachers' practice. The workshop activities included: active methods, the method of experiential learning, cooperative and problem method. The activities were realized through simultaneous individual activities, work in small groups, group discussions, talking circles and frontal forms of work. The results obtained showed positive changes among teachers regarding the acquisition of knowledge related to the preventive measures against peer violence. With regard to the students, the observed changes were related to their expansion of knowledge about violence, improvement of their mutual cooperation and higher level of tolerance in resolving conflicts.

**Key words:** action research, evaluation, teachers and students, prevention of violence, reflective practice.

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\* Аутор за кореспонденцију: Јелена Максимовић, Филозофски факултет у Нишу, Ћирила и Методија 2, 18000 Ниш, Србија, [jelena.maksimovic@filfak.ni.ac.rs](mailto:jelena.maksimovic@filfak.ni.ac.rs)

## УЛОГА АКЦИОНОГ ИСТРАЖИВАЊА У ПРЕВЕНЦИЈИ НАСИЉА У ШКОЛАМА – ПРИМЕР РЕФЛЕКСИВНЕ ПРАКСЕ

### Апстракт

Циљ спроведеног акционог истраживања усмерен је на подстицање наставника на стручно и професионално усавршавање, као и на укључивање у спровођење програма превенције насиља, уз стварање повољне климе у разреду за развој сваког ученика. Такође, у раду се указује на важност и ефикасност примене акционих истраживања у унапређивању рефлексивне праксе наставника. У истраживању су примењене четири фазе акционог истраживања: спровођење обуке за наставнике, осмишљавање и реализовање активности, евалуација наставника и ученика, као и целокупног програма. За формативну евалуацију коришћен је упитник за процену успешности акције, односно радионичарских активности, као и интервју са наставницима након спровођења сваке активности. За сумативну евалуацију коришћен је упитник о процени почетног и завршног знања ученика о врстама и облицима насиља. Трећи упитник осмишљен је за испитивање саморефлексија праксе наставника. У акционом истраживању је за потребе спровођења активности коришћен широк спектар метода: активна метода, метода искуственог учења, кооперативна и проблемска метода. Од облика рада са ученицима организовани су, а потом и остварени: симултана индивидуална активност, рад у малим групама, групна дискусија, разговор у кругу и фронтални облик рада. Након спроведене обуке наставника о превенцији појаве насиља у школама, која је била саставни део акције, резултати истраживања показали су позитивне промене у погледу стицања знања о начинима превентивног деловања. Истовремено, промене у односу на ученике видљиве су у завршном мерењу у погледу проширивања знања о насиљу, побољшања међусобне кооперације и вишег нивоа толерантног понашања у решавању сукоба.

**Кључне речи:** акционо истраживање, евалуација, наставници и ученици, превенција насиља, рефлексивна пракса.

### INTRODUCTION

In recent years, school violence has escalated to a worrying scale. The members of the school community are constantly looking for effective solutions in its prevention. Therefore, the starting point of this action research was the problem of peer violence, the discovery of different prevention models that will reduce the incidence rate and improve the classroom and school climate. The choice of the research problem arose from the desire to introduce innovations that would change the existing situation, i.e. to find out how the prevention of peer violence improves the teaching practice.

Action research aims to improve pedagogical-educational practice, but the specificity of this research is that the problems are identified and solved by teachers themselves, and not by professional researchers. The action research, primarily starts from the needs of teachers as reflective practitioners, and not from the ideas of individuals or institutions outside the school context. However, the action research, unlike other research approaches, is closest to the modern notion of practice. Through the process

of action research, teachers can solve the identified problems and improve practice in accordance with autonomously set goals. At the heart of the action research is the action, and the data collected serve as feedback on the basis of which it is possible to adjust and change the planned activities. Thus, the whole research process becomes a flexible and creative response to the needs of research participants. Despite the fact that the action research implies the internal motivation of those who do it, it is important that there is a need to achieve this very demanding professional role in schools, and the need to conduct action research advocates the need to change the role of teachers in the teaching process and is the important tool of strengthening teachers.

The action research is a systematic process of identifying problems in practice, planning an intervention, implementing an intervention, evaluating results and reflective practice. This type of research is related to the improvement of pedagogical-educational practice and teaching and starts from a different epistemological order of social sciences and social practice, and therefore differs significantly from classical methodological research models.

The action research project is not methodologically precise as required by empirical-analytical research. According to its methodological structure, it is very flexible and represents only a research framework. It can be changed, supplemented and corrected depending on the circumstances. The action research is a specific process of combining different methods in the process with the aim of raising awareness, encouraging intergroup interactions and motivating teachers and students for change. Also, they are used in solving specific practical problems that may be encountered in the classroom, school or in individuals engaged in independent education and learning. Despite the benefits that the action research has in improving teacher practice, it is still rare and little attention is unjustifiably paid to it in our theory and practice. The action research includes action and research, improvement of the existing situation by introducing innovations, and in this research, the emphasis is on the prevention of peer violence.

### *ROLE OF TEACHERS OF REFLECTIVE PRACTITIONERS IN SCHOOL VIOLENCE PREVENTION*

The understanding that a teacher practitioner, after completing studies and professional training, applies in practice her/his knowledge acquired from a certain narrow professional field, which determines her/his work and her/his role, is no longer so limited. The teaching profession becomes practical and implies reflection in action. The teacher considers all aspects of her/his practical work and strives to re-examine where he takes into account his knowledge, beliefs and personality. The teacher becomes a researcher and evaluator of her/his own practice and the initiator of action research (Buđevac et al., 2015). Such reflective

practice helps the teacher in solving practical issues that are important for her/his professional development (Florez, 2001).

Reflexive practice shows positive effects in terms of understanding the role of teachers in changing practice (Hrevnack, 2011). It provides support to teachers in improving student teaching and learning (Hoffman et al., 2003; Fendler, 2003). Research by these authors has shown that teachers can be reflective practitioners who can contribute to curriculum change. Their self-reflection influences classrooms to experience as learning communities, where students are curriculum creators and collaborators in the teaching process (Bintz & Dillard, 2007). Other research (Zafar Iqbal, 2017) also confirms that a teacher who is a reflective practitioner manages the class better. What is required in the notion of reflexivity is the awareness of what influence the participants, as practitioners, have on the research process, how their values, attitudes, perceptions and feelings are reflected in the situation being studied. In this context, a sample of teachers was selected for the action research and their role in the possibilities of preventing the occurrence of violence was tested.

Due to the increasing frequency of violence, schools face many problems involving antisocial behavior of students. Such a situation requires development of different approaches and prevention programs for students (Mayer, 2001) in order to develop a nonviolent environment in the school community. The most recent research (Donat Bacioğlu & Onat Kocabıyık, 2019) shows that individual factors of students' violent behavior are: conflict management skills, psychological problems, unhealthy communication and personality traits. Other studies emphasize low self-esteem (Miller, 1994), low tolerance in case of disappointment (Weir, 2005), but also environmental factors such as: culture, role models, poor housing conditions, technology, etc. (Öztürk-Çopur et al., 2015). Another study (De Wet, 2016) shows an increase in violence, not only within the school community, but also outside its framework. Because of such exposure of children primarily, there is a greater danger and risk for the adoption of destructive behavior. For this reason, the need and necessity of implementing prevention programs within the school community is recognized. Prevention of school violence involves the formation of attitudes, beliefs and behaviors of children before unacceptable behaviors become an integral and everyday part of their lives (Hitrec, 2010). Its application is possible through teaching and extracurricular activities. Through teaching activities, the responsibility for preventive action lies with the teacher. The communication channel between teachers and students contributes to an open and cooperative relationship, which contributes to the positive influence of teachers on student behavior. In addition to personal example, teachers have the opportunity to act and introduce children to violence through teaching content. It is equally important to take into account that prevention programs, as well as interventional action on the occurrence of violent behavior, apply not only to students, but also to parents,

school, local and social community (Smokowski & Holland Kopasz, 2005). Therefore, recent research emphasizes the acquisition of skills needed for planning and implementing prevention programs (Donat Bacıoğlu & Onat Kocabıyık, 2019). If the role of teachers in the prevention of violence is seen through her/his reflective practice, then the importance of her/his competence for the implementation of various programs that contribute to its reduction is noticed.

The aim of the paper is aimed at training teachers for preventive action, reacting in case of problems, recognizing the types and forms of violence, as well as getting acquainted with the ways of preventive programs. In accordance with the planned aim, the action research has been realized and further analyzed in accordance with the phases of the action research, which include: planning, action, observation and reflection.

### *RESEARCH METHODOLOGY*

Action research is, as the term itself says, both action and research, a process of changing practice and the construction of knowledge. At the heart of the action research is the action, and the data collected serves as feedback on the basis of which it is possible to adjust and change the planned activities. Thus, the whole research process becomes a flexible and creative response to the needs of research participants. It is a flexible, situation-sensitive methodology. The characteristic of the action research is its endless dialectic. It does not change the population, but only individuals.

We start the action research with the baseline values and research questions that provide clear guidelines to action researchers. The starting values of the action research are: improvement of the pedagogical-educational practice, prevention and suppression of peer violence, favorable social climate in the classroom.

The questions for conducting the action research are as follows:  
1. What is the role of the action research and how can it contribute to the search for the causes of violence, violent behavior and aggression of respondents? 2. Does the active participation of the respondents and this type of workshop work improve the practice of teachers? 3. Does the application of this way of work develop desirable traits, attitudes and adopt positive behavior patterns by students? 4. What can be changed in the school climate by applying the action research? 5. What are the reflections of all respondents, i.e. participants before and after the research? 6. Is the slightest shift, more positive attitude and result, visible after the conducted workshops?

When it comes to the type of the action research, collaborative, i.e. participatory research has been applied, which implies the inclusion of two or more teachers and classes in which the same problem occurs, in this case, violence. The collaborative approach enables communication

between the implementers of the action research through a discussion that leads to a deeper understanding of the problem. The aim is to find solutions to a given problem through the action, i.e. to strengthen the capacities of students and provide teachers with new competencies, in order to improve their own practice.

The following goals were set in the action research: 1. Acquisition of new competencies of teachers in violence prevention and their training for the practical application of what has been learned; 2. Improving the competencies of students for the active action in case of violence and getting acquainted with the ways of preventive action; 3. Encouraging personal engagement of teachers and students and their mutual cooperation in the application of acquired knowledge and skills in violence prevention; 4. The ultimate goal is to create a healthy and functional environment which will ensure the safety of students in the school community.

When it comes to workshops, two educational workshops with students from two classes have been applied, in which the problem of violence has been noticed. The workshops are designed specifically for the purposes of this research. The following has been used in the workshops: active methods, experiential learning method, cooperative and problem method. The following forms of work have been realized: simultaneous individual activity, work in small groups, group discussion and conversation in a circle. One part of the workshop included a frontal form of work, where the emphasis was on teachers' lectures on the topic of violence. In that way, the emphasis was on acquiring knowledge, ways of reacting and reporting violence. In the research and its analysis, a descriptive method was used with the techniques of surveying students and teachers and interviewing teachers after certain implementation activities.

In order to determine the desired changes in students' knowledge at the beginning and the end of the workshop work with students, a questionnaire was realized, which consisted of 8 open-ended questions. This questionnaire was also a summarized evaluation of the effectiveness of the action research. Formative evaluation of workshop activities was realized through a questionnaire with three open questions.

An open-ended questionnaire for teachers was also used in the research. It was conducted in order to find out the self-assessment of their reflexive practice, recognition of changes and the importance of the action research in the prevention of violence. The research involved 43 students from the fifth grade (two classes) and 2 teachers from the classes where the need for violence prevention was recognized. The research was realized in the elementary school *Učitelj Tasa* on the territory of the City of Nis in 2019. Three phases were applied in the research. The first included planning – problem identification, teachers' training and activities creation. The second phase included practical application, i.e. the implementation of activities and evaluation. The last, third phase, involved the evaluation of the entire



program, with the aim of recognizing the achieved results by comparing the initial and the final state.

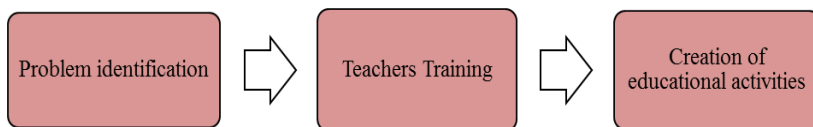
### *INITIATING OF THE ACTION RESEARCH*

The action research is considered a specific method by which theoretical assumptions are practically applied, by testing its effectiveness (Carr, 2006; Larrivee, 2000). Other authors (Reason & Bradbury, 2001) consider the action research in a broader context, which implies a focus on a participatory view to the world. It is a democratic process that combines theory and practice, action and reflection and encourages cooperation in order to find practical solutions and ensure the progress of the individual and the community. In order for the action research to have fundamental scientific support, it is important to fulfill its core, which includes: the role of teachers in improving their own practice, considering problems through reflection, self-reflection and the action, as well as introducing associates to acquired experiences (Altrichter et al., 2002). On the other hand, the action research contributes to the simultaneous improvement of practice in the school community. Collaborative relationships are established not only between teachers, but also parents, municipal boards and other educational institutions. The established cooperation and solving common problems through involvement in research cycles enables professionalization of all participants (Calhoun, 1993). So, empowering teachers to conduct the action research is achieved by developing techniques, networking successful practice expertise, and creating conditions for innovation testing (Gallagher-Brett, 2019). That is why the application of the action research for teaching practice is important, because its goals are aimed at solving common problems. In this paper, as already emphasized, the action research encompasses and analyzes through phases: planning, action, observation and reflection (McNiff, 2002) and the obtained results are presented and interpreted through these phases.

### *DISCUSSION RESULTS AND REFLEXION AND PLANNING PHASES*

The action research in relation to other research approaches is a modern and purposeful way of solving practical problems. Such an approach implies flexibility in work and reflexive openness to new challenges in improving pedagogical-educational practice. Their importance is also evidenced by the results of research that has been proven to contribute to the professional development of teachers (Maijala & Pageze, 2018). On the other hand, students' experiences have shown that the action research strategies have contributed to them to feel more capable of learning (Kenny & Puig, 2018). As already emphasized, the action research implies several phases, and in this part, the problem of violence in practice is identified through the

cooperation of teachers. Emphasis is placed on achieving the first goal of the research, which includes the acquisition of new competencies of teachers in the prevention of violence and their training for the practical application of what has been learned.



*Figure 1. Activities in the first phase of research*

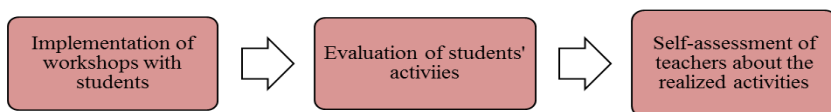
By observing and analyzing the current situation, i.e. primary problems, teachers who need help have been identified and accordingly, conditions have been created for strengthening the capacity of teachers and active action in problem solving. The teachers in school were informed about the goal of this research and agreed to be participants in the research on a voluntary basis. In cooperation and direct conversation with teachers, the following problems were identified in the class: discriminatory behavior of students, frequency of peer violence, passivity in situations of violence, lack of responsibility for reporting and reacting, etc. Regarding the role of teachers, the problems were noticed: underdevelopment of the pedagogical approach in the way of reacting in case of violence, lack of knowledge about the ways of preventive action and realization of the action research. After identifying the existing problems through conversation with the teachers, the training of teachers started in order to prepare them adequately for the practical implementation and change of the existing practice. The training was held by researchers, assistants and critical friends who were active participants in the research.

The training was about providing knowledge about the role of the teacher of reflective practitioners, in recognizing the types and forms of violent behavior, measures and programs of preventive action, introduction of techniques and forms of workshop and pedagogical approach. The training segments were realized from the direct experience of working with teachers and students. The training proved to be successful, especially in the field of prevention programs and the adoption of techniques, methods and forms of the workshop. Teachers were introduced with the programs aimed at strengthening the relationship between children and their parents, social support, media intervention and support programs for victims of violence. The training of teachers lasted for two weeks, with an agreement that the meeting should take place when it suits them, before classes or after classes, in classrooms when there are no students. For the training, we used power point presentations, educational films, results of empirical research of violence prevention programs, and accordingly, they were introduced to the role of the action research. The training is mostly dedicated to programs that aim to de-

velop social skills in students as one of the ways to prevent violence. After the training, we started creating educational workshops for students in accordance with the segments covered by the training and thus managed to create a sense of empowerment in *teachers* "I am a reflective practitioner, action researcher." The content of educational workshops refers to introducing students to the problem of violence, their experiences, providing information on how to react and report violence. The workshops are adapted to the age and abilities of students and are aimed at developing their social competencies. In order to more adequately prepare for the implementation of educational workshops, teachers had the opportunity to consult researchers.

### *ACTIVITIES IMPLEMENTATION AND RESEARCH PROCESS EVALUATION*

After the held teachers training, the selected target group (consisting of 43 students and 2 teachers) approached the second phase of the research, which included the activities shown in Figure 2.



*Figure 2. Activities in the second research phase*

Before the beginning of the realization of the educational workshops, the students were given a short questionnaire with open-ended questions in order to check their current knowledge about the forms and types of violence, the ways of their action in case of violence, etc.

*Table 1. Open-ended questions for students*

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1. Define the concept of violence in your own words?
2. What types of violence exist?
3. What forms of violence exist?
4. What do you do when you see one student behaving violently towards another one?
5. What do you do when one student is violent towards another one?
6. State the characteristics of a person who suffers the violence and the person who commits violence against other people?
7. When the violence occurs, to whom do you report it?
8. List suggestions on how to reduce violence in your school?

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By analyzing the questionnaire in the initial measurement, we were able to see the following results. The most common responses of the respondents were analyzed. The answers indicate that most of 43 students are able to define the concept of violence and most often do so using ex-

amples and their own definitions. When it comes to the second and third questions, the students know and state the types and forms of violence, but it was obvious that they do not know everything (social and sexual violence is most absent). Students often do not know how to react in case of violence, and some respondents state that they invite older people to intervene. Students believe that they should *not interfere* in the conflicts of others or *make an even bigger conflict*, but also that "one should not laugh at others who suffer violence. The majority characterized the victims as lonely "*they are children who have no friends or sit alone in a bench*". Some respondents point out that these are most often *children who have some problem, an aggressive attitude*. On the other hand, most of the respondents think that the bullies are *restless students in a class, harassers because they are jealous, because they do not have good results or something else*.

When reacting to violence is in question, almost all students point out that violence is reported to parents and teachers, and only some individuals mention the pedagogical-psychological service and the police. Students see the solution to the problem of violence in punishing those students who show violent behavior, that teachers in class should talk more about students' problems and that there should be education for students. None of the students emphasizes their active work in the prevention of violence. By obvious comparative analysis, when it comes to differences in relation to classes, there were none, the answers are uniform, i.e., mostly homogeneous.

In their classes, teachers presented instructions from researchers and knowledge about prevention measures to their students and they had the freedom to create them.

After having realized the workshops, the students evaluated the activities and work of the teachers through a questionnaire. Formative evaluation was applied in both classes.

*Table 2. Evaluation of teachers' work*

- 
1. *What did you like most in educational workshops?*
  2. *What did you like least in educational workshops?*
  3. *Would you like this way of work to be applied in teaching other subjects and why?*
- 

By analyzing the answers of the respondents, the following answers are sorted out: *it is much better in this class, it was very interesting to learn like this, it was very relaxed, we could express our opinion without being criticized, this is how we learn more*.

Everyone was pleasantly surprised by the way they worked, which they pointed out in their answers: *I like it a lot, this is the first time we work like this, I don't know what we don't do with others in class, at first I was bored, and then I got the desire to answer*. The students stated that they like

this way of working and that they want to apply it to other subjects. As a reason, they cite greater motivation for adopting the teaching content: *it is much better, because time passes very quickly, and in other classes it never passes, it is interesting, because we talk to others and learn together, it is somehow relaxed, I don't have to watch everything I will say, in an interesting way we learned everything about violence and how we should behave and how to prevent it, everyone would love boring subjects if they learned like this.* We received answers with a more negative connotation from the students of the second grade. In general, the students praised the activities, emphasizing that they learned more in this way than during the classical classes.

Thus, the differences in students' responses in relation to the class are visible in terms of the "performance effects" of teachers who have implemented educational workshops. In the first, better mutual interaction with students was achieved, than in the second. We may recognize the possibility of more negative student responses in the fear of a new way of working that "may" have prevented a teacher from another class from conducting workshops as well as the first teacher. Therefore, this formative evaluation by the students confirmed that it is necessary for the teacher of the second class to change the leadership style, in order to additionally motivate the students to work and meet the criteria required by this innovative way of working. After the realization of educational activities, a meeting was organized with teachers in order to initiate a discussion on possible problems, self-reflection, changes and finding ways to improve their further work. First, an individual self-assessment was made, and then a discussion was initiated in order to more adequately assess their work and future improvement. Therefore, formative evaluation was applied here as well. Teachers in both classes were realistic in their assessment, with teachers from the other class showing insecurity and still unwillingness to implement this way of working, which was in line with the perception of students in that class. In this regard, it can be stated that there is a visible lack of pedagogical competencies in working with students. This points to the need for teacher education and the importance of strengthening the competencies of "their weaknesses".

### *EVALUATION OF PROGRAMME EFFECTIVENESS*

After the end of the action, in the final phase, a summative evaluation of the entire program and self-evaluation, i.e. critical reflection of the teacher's own work, was started. One of the methods used in this research is to determine the effectiveness of the program through a final survey of students. The questionnaire created for the needs of this research was used in the first and final phase of the action research (*Table 1*), in order to notice the achieved changes and evaluate the quality of the program. It examined whether the activities carried out by the teacher contributed to

the expansion of knowledge in relation to the initial situation, when it comes to violence.

Based on the repeated survey, the following changes in the knowledge of most students were identified: (1) a more adequate description of the concept of violence by giving examples; (2) recognition of all types and forms of violence; (3) providing multiple answers regarding reporting of violence (parents, teachers, professional service, principal, police, NGO sector, etc.); (4) a more substantial description of the person who suffers violence, emphasizing the characteristics of the victim of violence; (5) ways of preventive action, unlike the original answers, indicate that active and preventive action includes the action of students and the application of preventive activities within the school community. Thus, the results indicate positive changes in the expansion of students' knowledge, but also improvements in group relations and mutual cooperation of students who exhibit aggressive behavior.

The summative evaluation also included the application of a questionnaire for teachers in order to find out their self-assessment of reflexive practice, to recognize the changes and the importance of the action research in prevention of violence. Based on the teachers' answers, it can be concluded that the self-assessment was equal in terms of the assessment of their work. They pointed out that they had fulfilled all the tasks and met the criteria. On the other hand, they pointed out that there was dissatisfaction with some segments such as: approach to working with students, lack of self-confidence, competence and experience in using the workshop mode. Since this is their first experience in such a program, self-reflection has proven to be an excellent way to understand their quality of work and improve further reflexive-practice. Having in mind the training attended, they point out that they provided all the information regarding the problems and ways of preventive action on the occurrence of violence, which left a positive effect on students. They see positive changes in terms of student participation, positive reactions that are often lacking in classical teaching, increased cooperation between students who exhibit aggressive behaviors and often enter into conflicts, as well as in the manifestation of higher levels of tolerant behaviors. In their opinion, the workshops were educational for both students and for them as educators and reflective practitioners. Students had the opportunity to learn in a creative way, using innovative working methods. The teachers pointed out that they learned more about the programs of preventive action, ways of reacting to the occurrence of violence, as well as the workshop approach, which were the bases for creating the opportunities for the development of students' social competencies. As suggestions for improving the program, teachers state: the inclusion of a larger number of teachers, more practical exercises and familiarity with the action research, in order to strengthen their capacities for further application.

## CONCLUSION

Every innovation in the educational system or pedagogical practice is not at the same time the action research. The action research always represents the transformation of pedagogical-educational practice, "controlled innovation", i.e. an attempt to change / improve pedagogical practice, which is at the same time a way of learning about the practice itself and the situation in which it takes place. In order for the action to really lead to changing and learning about social and pedagogical-educational practice, it must be planned, as an attempt to solve the problem, and then subjected to systematic monitoring, analysis and evaluation, again from the point of view of its contribution to solving the problem.

The focus of this action research is the involvement of a reflective practitioner teacher in preventive solution of current problems of violence, with the aim of improving her/his professional role, self-reflection of her/his own work and developing social competencies as one of the ways to prevent violence among students. The phases of the action research included: the realization of teachers' training, creation of activities, realization of activities and evaluation of teachers, students and the entire program.

Taking into account the mentioned goal, the effect of a change is visible in relation to teachers and students. Changes were noticed with students in the expansion of theoretical knowledge and the development of awareness of their active work in prevention of violence. In relation to the starting phase of initiating the action research, it can be concluded that the implementation of training and practical application of violence prevention programs for students has led to changes in social relations and greater interactivity in the classroom. So, it is visible in terms of showing greater cooperation, tolerance and non-violent conflict resolution in educational workshops. After the summative evaluation, it was determined that the students were encouraged to be responsible in terms of their active action in solving the problem of violence, but also that in general there was an expansion of their knowledge about this problem. On the whole, the workshop way of working was successfully evaluated by both the students and the two teachers. This opens the possibility for the application of this type of work in regular classes.

On the other hand, this research is also significant due to changes in the work of teachers. The changes are visible in: an open approach to the application of workshop work, motivation to acquire new competencies, an active approach to problem solving, but also the most important successful results in working with students in prevention of violence. If the overall results are considered, the need for the implementation of long-term programs for prevention of violence by teachers can be indicated. This paper confirms that the reflexion practice of teachers provides an incentive for professional enrichment and solving key problems of the school community in prevention of violence.

For this reason, we note that the validity of the action research cannot be calibrated nor can the presented results be generalized to the entire teacher or student population. Every change, micro-change is a kind of empowerment of teachers and an opportunity to improve this issue. Every teacher can apply a similar method of work in their work with the aim of educating prevention of violence in schools.

The conducted action research also opens new questions: whether the change in student behavior is real or whether it will be of a short-term character or will have long-term effects. The questions and dilemmas that are crystallizing before us, can be solved with a new research in school. The action research does not represent the end of one process, but a new beginning for further research and changing and improving pedagogical-educational practice.

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## УЛОГА АКЦИОНОГ ИСТРАЖИВАЊА У ПРЕВЕНЦИЈИ НАСИЉА У ШКОЛАМА – ПРИМЕР РЕФЛЕКСИВНЕ ПРАКСЕ

**Јелена Максимовић<sup>1</sup>, Данијела Стојановић<sup>2</sup>, Јелена Османовић<sup>1</sup>**

<sup>1</sup>Универзитет у Нишу, Филозофски факултет, Ниш, Република Србија

<sup>2</sup>Универзитет у Нишу, Факултет уметности у Нишу, Ниш, Република Србија

### Резиме

Примена акционих истраживања у школском контексту може довести до важних промена, које су данас саставни део наставничке професије. Овај рад показује да путем колаборативног акционог истраживања можемо развијати најразличитије компетенције и код ученика, као што су прихватање и толеранција. Акционо истраживање представља пут, начин или метод како унапредити сопствену праксу. Основни циљ истраживања заснован је на формирању пријатне школске климе и на осигуравању безбедности ученика у школској заједници. Задаци истраживања усмерени су ка формирању компетенција наставника за активно деловање и превенцију у ситуацијама појаве насиља. Са друге стране, у процес истраживања били су укљу-

чени и ученици, који su радионицама оспособљени да спознају и делују у случају појаве насиља.

Акционо истраживање имало је фазу планирања, фазу акције и фазу рефлексije. Спроведено је у два одељења, при чему је у њима претходно био уочен проблем насиља. У истраживању које је спроведено 2019. године учествовало је укупно 43 ученика и 2 наставника разредне наставе. У емпиријском делу истраживања примењене су две едукативне радионице у којима су коришћени различити облици рада, почев од рада у малим групама, дискусије, па све до предавања наставника на тему насиља и превенције насиља, а који су претходно прошли обуку истраживача. Организовано је почетно и завршно мерење путем упитника отвореног типа како би се измериле разлике у знањима ученика о насиљу пре истраживања и након њега, што је за потребе извештаја о спроведеном акционом истраживању представљало сумативну евалуацију. За ученике је осмишљен и упитник, који је такође био отвореног типа ради испитивања ученика о импресијама након спроведених радионица, што је пружило формативну евалуацију истраживања. На крају, трећи упитник отвореног типа био је намењен наставницима, а помоћу њега су испитане саморефлексije о рефлексивној пракси, импресијама о насталим променама које су наставници учили, а које се могу десити посредством акционог истраживања. Истраживање је дало значајне резултате. Наставници су исказали мотивисаност за примену акционог истраживања и примену радионица у сопственој пракси. Са друге стране, резултати показују да су ученици показали веће теоријско знање о појму, врстама и облицима насиља, као и о начинима превенције ове појаве у школском окружењу. Истраживање нуди низ педагошких импликација: спровођење акционог истраживања јача наставничке компетенције, ствара бољу климу у одељењу, стално се стручно усавршавају, врше непрестано критичко преиспитивање, што је основна карактеристика акционог истраживача и рефлексивног практичара. Како би и ученици и наставници превентивно деловали у сузбијању насиља, неопходни су дугорочни покушаји и спровођење непрекидне акције. Истраживање је практично и применљиво на решавање најразличитијих ситуација које се дешавају у школском контексту, па се стога указује на још већу афирмацију примене акционих истраживања.

## WRITING IN CHILDREN WITH DISABILITIES

Lucija Djordjević<sup>1</sup>, Srboљub Djordjević<sup>2\*</sup>, Lјilјana Mitić<sup>2</sup>

<sup>1</sup>Elementary school for special education "Vule Anti" Vranje, Serbia

<sup>2</sup>University of Niš, Pedagogical Faculty, Vranje, Serbia

### Abstract

The paper presents the results of a study aimed at examining the ability and level of writing proficiency in students with disabilities at primary school age. The sample consisted of 58 students with disabilities of primary school age. Dysgraphic Prediction Test and Lilien Lirs graphomotor array were used to assess visual perception and graphomotor skills, while the handwriting was evaluated by the Scale for Assessment of Dysgraphic Forms in handwriting. The obtained results show that a large number of subjects (24 or 41,4%) did not score a single point on Dysgraphic Prediction Test, while only 21 subjects (36,2%) successfully completed the test ( $M = 7,98$ ,  $SD = 7,062$ ). Also, the obtained results show that the highest number of respondents (39 or 67,2%) did not score a single point on the Lilien Lirs test, while only 10 respondents or 17,2% successfully completed the test ( $M = 1,60$ ,  $SD = 2,46$ ). Using the Scale for the Assessment of Dysgraphic Forms in handwriting, we found that out of 22 written samples, 9 students (41%) have a well-developed handwriting, 8 (36%) have an ugly handwriting, 3 (14%) respondents have dysgraphic handwriting, while 2 (9%) respondents have a pronounced dysgraphic handwriting. Out of the total number of respondents, 36 (62%) of the sample students could not write the appropriate text on the basis of which the sample of the handwriting was taken. The obtained results provide the exact knowledge of the presence of difficulties in adopting writing by students with disabilities.

Teaching students with disabilities, according to the results obtained, imperatively imposes the need to respect the developmental characteristics of this population of students and the individualization of the initial teaching of writing. This involves major changes to the standards and outcomes of achievements required by the regular curriculum and the development of an IOP for each student with more complex individualized contents to support the child in order to adopt writing. However, effective work with this student population also entails the need to adopt special curricula intended for teaching in schools for students with disabilities.

**Key words:** writing, dysgraphia, students with disabilities, primary school.

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\* Аутор за кореспонденцију: Србољуб Ђорђевић, Педагошки факултет у Врању, Партизанска 14, 17500 Врање, Србија, dr.djordjevic@yahoo.co.uk

## ПИСАЊЕ КОД ДЕЦЕ СА СМЕТЊАМА У РАЗВОЈУ

### Апстракт

У раду су приказани резултати истраживања које је имало за циљ да испита могућност и ниво усвојености писања код ученика основношколског узраста са сметњама у развоју. Узорак истраживања је чинило 58 ученика основношколског узраста са сметњама у развоју. За процену визуелне перцепције и графомоторних способности коришћени су Предикциони тест за дисграфију и графомоторни низ Лилијен Лирс, док је рукопис процењен Скалом за процену дисграфичних форми у рукопису. Добијени резултати показују да велики број испитаника (24 или 41,4%) није остварио ниједан поен на Предикционом тесту за дисграфију, док је само 21 испитаник (36,2%) успешно решио тест ( $M = 7,98$ ,  $SD = 7,062$ ). Такође, добијени резултати показују да највећи број испитаника (39 или 67,2%) није остварио ниједан поен на тесту Лилијен Лирс, док је само 10 испитаника или 17,2% успешно решило тест ( $M = 1,60$ ,  $SD = 2,46$ ). Применом Скале за процену дисграфичних форми у рукопису утврдили смо да од 22 узорка рукописа код 9 ученика (41%) постоји складно развијен рукопис, 8 (36%) има ружан рукопис, дисграфичан рукопис има 3 (14%) испитаника, док 2 (9%) испитаника има изражено дисграфичан рукопис. Од укупног броја испитаника, 36 (62%) ученика нису могли да напишу одговарајући текст на основу кога се узима узорак рукописа. Добијени резултати пружају егзактна знања о присуству тешкоћа у усвајању писања од стране ученика са сметњама у развоју.

Наставни рад са ученицима са сметњама у развоју, сходно добијеним резултатима, императивно намеће потребу поштовања развојних карактеристика ове популације ученика и индивидуализацију почетне наставе писања. То подразумева знатне измене стандарда и исхода постигнућа који се захтевају по редовном наставном плану и програму и израду ИОП-а за сваког ученика са комплекснијим индивидуализованим садржајима подршке која се пружа детету у циљу усвајања писања. Међутим, ефикасан рад са овом популацијом ученика подразумева и потребу доношења и посебних наставних планова и програма намењених школама за ученике са сметњама у развоју.

**Кључне речи:** писање, дисграфија, ученици са сметњама у развоју, основна школа.

### INTRODUCTION

Writing is, in its essence, a visual record of communicating a message through the transformation of language into an appropriate symbolic-grapheme system. The basis of writing is contained in the language itself when it comes to the content of a written message. In this way, one form of language is manifested, and that is its visual component. What is the most elementary in the language, which is the *phoneme*, in writing is the *letter* or *grapheme*. While the language is assisted by speech organs to express itself, expressing writing is assisted by a hand with the system of certain graphomotor movements – the control over hand movements while writing is conditioned by a visual analyzer that stores the visual memory of graphemes, as well as all that constitutes spatial orientation when writing. Based on the above, it can be concluded that the expression of writing is based on the integration of the *linguistic*, *visual* and *graphomotor* systems. The very content

of the written message is constructed with elements of language, in compliance with all phonological, lexical, grammatical and syntactic rules and principles. In addition, orthography and its rules must be obeyed in written speech, although, strictly speaking, orthography is at its core an interpreter of ways of speaking. So, for example, a pause, a sigh, a question, etc., according to the orthography in writing, we denote by a full stop, a comma, a question mark, etc. Accordingly, it can be concluded that orthographic signs accompany the acoustic properties of speech. The mentioned three systems (linguistic, visual, and graphomotor) develop for themselves from the beginning of childhood development and, by the time a child needs to master the act of writing, they interconnect (Van Galen, 1991; Smits-Engelsman & Van Galen, 1997; Longcamp, Anton, Roth & Velay, 2003; Longcamp, Boucard, Gilhodes, & Velay, 2006; Berninger et al., 2006).

The development of a child's handwriting is related to the maturity of fine motor skills, visual perception, phonological awareness, spatial orientation, attention, memory, executive functions, as well as other cognitive functions. Bojanin emphasizes the existence of certain periodization in the maturity of the child's handwriting, citing three phases: *pre-calligraphic* (pre-school age), *calligraphic* (I and II grade of elementary school), and the *stage of individualization* of the handwriting (grade III of elementary school and further) (Bojanin, 1985).

This is also indicated by studies of the development of writing in the first grades of school age in which it was found that the act of writing develops rapidly during the first grade (age of six and seven), that it reaches a certain plateau in the second grade (age of seven and eight), that it further develops during the third grade (eighth and ninth years) when it becomes an automatic, organized and determined tool that enables the development of new ideas (Blöte & Hamstra-Bletz, 1991; Karlsdottir & Stefansson, 2002). However, some children experience difficulties in adopting writing (Schneck, Amundson, Case-Smith & O'Brien, 2010).

Written speech is the result of training that begins with the conscious mastery of the means of written expression of thoughts. However, the development of written speech ability is not the same as the development of oral speech ability, nor is writing related to the mere translation of voice speech into written characters. In addition, written speech cannot be regarded only as the mastering of writing technique. Writing is a complex psychomotor activity of proper graphic letter formatting which is coordinated with the thought process. This process involves the coordination of fine hand and fingers motor, visual perception, and nerve activity, and of psychic functions: attention, memory, logical and abstract thinking, as well as motivation (Maeland, 1992; Kaiser, Albaret & Doudin, 2009; Cornhill & Case-Smith, 1996; Kulp, 1999; Barnhardt, Borsting, Deland, Pham & Vu, 2005; Volman, van Schendel & Jongmans, 2006; Ilanković & Ilanković 2001; Dimitrijević & Bjelaković, 2004). Written speech, in addition to the ability to

form letters and words, implies the existence and development of certain structures and functions which participate in the actual realization of the act of writing. The very act of writing is done by a graphomotor coupling which consists of arm muscles, above all those of fingers and hands, neuromuscular junctions and the organizer of writing in the central nervous system. In handwriting itself, the projection of harmonic lineation abilities, a certain rhythmic arrangement between letters and words, the direction in which the graphomotor act is accomplished, as well as the ability to form a graph are expressed. The above points to the conclusion that the act of writing is determined by the conception of space: the direction of the sequence, the rhythm of the arrangement of graphs in space, a certain "play" of tension and relaxation of the muscle masses participating in the act of writing, as well as the quality of emotionality of the person at the very moment of writing.

At the time when a child is being trained to write at school age many psychic functions which underlie the very act of writing are in the developmental stage, so that learning relies on insufficiently matured cognitive abilities, but also on insufficiently matured motor skills and sensorimotor abilities (Smits-Engelsman, Niemeijer & van Galen, 2001; Volman, van Schendel & Jongmans, 2006; Huau, Velay & Jover, 2015). There are many experts who emphasize that there is an optimal period for training a child in writing and they point out that it is closely related to the biological maturity of a child (Weil & Amundson, 1994; Cornhill & Case-Smith, 1996; Richards et al., 2011). It has been observed that in children between the ages of 5 and 7, a very intense and spontaneous desire for written speech appears, which does not occur to that extent at any other age. This is the main reason why this phenomenon is called explosive writing, and the very period of its occurrence is the sensitive period that is the most sensitive to this type of learning (Radoman, 2003). The well-known Russian psychologist Vigotski, studying children of this calendar age, also confirmed the existence of this sensitivity, but in his opinion, it is conditioned, first of all, by social, not biological origin, and it emerges as a product of the child's cultural development which is conditioned by teaching and cooperation. Written speech is linguistically similar to speaking, however, it is psychologically different from it. It does not imply the simple translation of phonemic characters into graphs, nor can it be reduced to the level of the graphomotor ability, but the act of writing itself requires a high level of mental transformation and abstraction. The writing skill itself involves mental transformation, that is, the translation of inner speech to the outer. Inner speech is essentially abstract, encrypted, maximally concise, and does not respect syntactic rules because it has its own syntax, as many psychologists point out. Mental transformation enables the emergence of elaborate and grammatically shaped voice speech. It is precisely the higher level of mental transformation that enables the translation of inner speech into external written speech, which is basically even more elaborated (Vigotski, 1983).

When studying the development of writing, researchers increasingly seek to look at it in relation to the cognitive, social and linguistic abilities of children, as well as the demands placed on them by the curriculum. Writing skill is not easy to adopt and factors that facilitate or hinder writing development are also being studied. Also, great attention is paid to the optimal position of the body when writing (Cornhill & Case-Smith, 1996; Feder & Maynemer, 2007). These considerations include the position of the hand, the clenching of fingers, the pressure of the pencil on the paper, the angle of the body relative to the writing paper, as well as the height of the chair which is used while writing. Thus, for example, a chair that is too low can cause the inhibition of finger movements and prevent the formation of a free letter, regarding the proper shaping of the graph. It also highlights the need to master simple strategies that involve moving paper when writing, selecting stationery and holding it properly.

The very act of the realization of writing, as we have already pointed out, implies the integration of the *linguistic*, *visual*, and *graphomotor systems* (Vladislavljević, 1991). This integration is achieved by a certain development of associative functions between the phoneme, articuleme, and grapheme. This means that there is a reciprocal action between them: the writing function evokes an auditory representation, a phoneme of the appropriate voice and a proper pronunciation, that the auditory representation of the phoneme triggers the appropriate articuleme and grapheme, that the visual memory of a particular grapheme causes an association with the auditory memory of the phoneme and articuleme.

It has long been known that writing disorders do not arise by chance, but that the origin of almost every difficulty can be explained. Considering that writing is the most complex human activity that integrates most of the brain's functions, impediments to writing cannot be interpreted merely as a lack of exercise of hand motor skills. Therefore, it can be said that graphomotor activity is directly related to visual perception, but it is not its sole, or decisive factor. Thus, it could be rightly emphasized that this is primarily a certain integration of complex afferent-efferent structures, which basically operate within the interactive operational composition of perception, motor, emotions, attention and memory (Rapaić, Nikolić & Nedović, 1995; Golubović & Rapaić, 2008).

Graphomotor system involves mastering a certain skill of holding a pen (it is a normal grip with a "three-finger tripod" that forms an arch between the thumb and forefinger, while the palm or the outside of the hand is in a semicircle), paper, a hand and a forearm, as well as different directions when drawing lines (up, down, left, right, vertical, horizontal, circular from larger to smaller dimensions) (Ilanković & Ilanković, 2001; Dimitrijević & Bjelaković, 2004).

On the path of mastering these abilities, the problem becomes greater if some children experience deviations from the developmental milestones, created by the presence of motor, hearing, visual, speech-

language, intellectual, behavioral or multiple disorders. Such children, according to the traditional classification, were categorized into different categories of children with disorders of sensory, intellectual and psychomotor functions and were educated in special schools according to the type of disorders, which represented the medical model.

The legal foundation of inclusive education in the Republic of Serbia goes beyond that concept. A child with disabilities is: a child with an intellectual disability, a child with sensory impairment, a child with motor impairment, a child with learning disabilities, a child with speech and language impairment, a child with behavioral problems, a child with emotional disability, a child with developmental disabilities that occur simultaneously in several areas. A student with disabilities acquires basic education and upbringing as a rule in a regular school together with other students, and in a school for students with disabilities when it is in the best interests of students. Children, regardless of the type of disability, are educated in a school for the education of students with disabilities, and they are enrolled based on the opinion of the inter-ministerial commission. These children, limited by the existence of the primary disorder, acquire academic knowledge and skills significantly more difficulty than their peers of the typical population. Failure in school activities lowers their self-confidence and self-esteem, and a range of interpersonal problems can lead to behavioral problems or reinforce the existing problems in this area of children's functioning, so they need complex support with the implementation of an Individualized Education Plan (IOP).

In literature which deals with the problem of mastering writing, it is pointed out that 5 to 30% of children have difficulties mastering writing and that it depends on the class that children attend, the criteria for selecting a sample of students, and the instruments for writing assessment (Hooper, Swartz, Montgomery & Reed, 1993; Feder & Maynemer, 2007; Mogasale, Patil, Patil & Mogasale, 2012; Cortiella & Horowitz, 2014).

### *Aims and Research Tasks*

Since writing is an ability that is essentially the integration of language, visual perception, and graphomotor skills, the main aim of the research we conducted was to examine the possibility and level of adoption of writing as a complex graphomotor act in children with disabilities in primary school age and, based on the results obtained, to propose appropriate measures to support children who have difficulties mastering writing as one of their academic skills.

The goal of the research we opted for assumed operationalization through the following tasks:

- Determine the ability to visually perceive the order, size, and shape of the figure in children with disabilities in primary school age;
- Examine the development of graphomotor abilities of children with disabilities in primary school age;



- Determine whether there are differences in visual perception and graphomotor abilities in children with disabilities with respect to gender;
- Determine if students with disabilities have difficulties mastering writing as a complex graphomotor act and the extent to which dysgraphia is present.

### *METHOD*

The sample consisted of all children with disabilities of primary school age who attend "Vule Antić" Primary and Secondary School in Vranje<sup>1</sup>. We have shown the sample of the survey in Table 1.

*Table 1. The sample of students according to gender and grade*

Grade	Gender		Total
	Female	Male	
I	3	4	7
II	2	1	3
III	5	3	8
IV	4	-	4
V	-	8	8
VI	5	4	9
VII	4	5	9
VIII	-	10	10
Total	23	35	58

The instruments used in the research were:

- Prediction test for dysgraphia "Edge Ornament", which examined the ability to visually perceive the order, size, and shape of a figure, as well as graphomotor skills in children with disabilities in primary school age (Budimirović & Vladisavljević, 1983, by Kostić, Vladisavljević & Popović, 1983);
- Lilien Lirs graphomotor series (Ćordić & Bojanin, 1992);
- A Scale for assessment of dysgraphic forms in handwriting that examined the ability to write in children<sup>2</sup> (Ćordić & Bojanin, 1992).

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<sup>1</sup> These are children with disabilities that manifest themselves simultaneously in several areas (combined disabilities)

<sup>2</sup> The scale for the assessment of dysgraphic forms in the handwriting was constructed by Ajuriaguerra and Ausias for the French language area, and was standardized for the Serbian Cyrillic alphabet

## RESEARCH RESULTS

### *Visual Perception of Order, Shape and Figure Size*

The ability to visually perceive order, shape, and figure size of the respondents was assessed by applying the Prediction test for dysgraphia, "Edge Ornament". Statistical processing of the obtained results was performed in SPSS Statistics 21. The obtained results are shown in Tables 2 and 3 and in Chart 1.

*Table 2. Success on the "Edge Ornament" Prediction test*

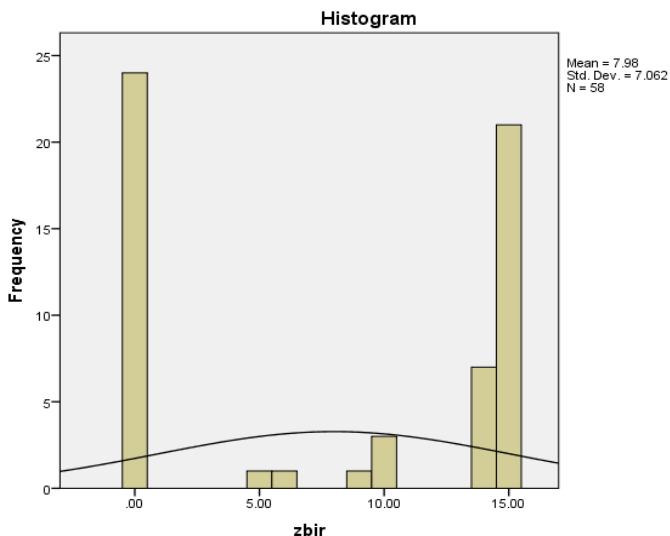
N	Valid	58
	Missing	0
Mean		7.9828
Median		10.0000
Mode		.00
Std. Deviation		7.06236
Minimum		.00
Maximum		15.00
Sum		463.00

*Table 3. Success on Prediction test expressed by frequency of results achieved*

Achieved results	Frequency	Percent	Valid Percent	Cumulative Percent
.00	24	41.4	41.4	41.4
5.00	1	1.7	1.7	43.1
6.00	1	1.7	1.7	44.8
9.00	1	1.7	1.7	46.6
10.00	3	5.2	5.2	51.7
14.00	7	12.1	12.1	63.8
15.00	21	36.2	36.2	100.0
Total	58	100.0	100.0	

Based on the total success achieved on the Dysgraphic Prediction Test shown in Tables 2 and 3, as well as on Chart 1, it is evident that the respondents achieved a total of 463 points, which is 53% of the maximum number of points that could have been achieved on the test (870 points).

Also, the obtained results show that the highest number of respondents (24 or 41.4%) did not score a single point, while only 21 respondents or 36.2% solved the test successfully ( $M = 7.98$ , and  $SD = 7.062$ ).



*Graph 1. Graphic presentation of success on the "Edge Ornament" Prediction test*

Taking into account the results obtained, we tested the existence of statistical differences in test success between female and male subjects by t-test of independent samples, both in terms of total results achieved and in terms of the success on individual test constructs (order, shape, size of figures, drawing around the edge and finishing the drawing).

The results of the t-test showed that there was no difference in success on the Prediction test between boys ( $M = 7.88$ ,  $SD = 7.21$ ) and girls ( $M = 8.13$ ,  $SD = 6.98$ );  $t(56) = 0.128$ ,  $p = 0.899$  (two-sided). The difference between the mean values by groups (mean difference = 0.244, 95% CI: -4.08 to 3.59) was very small (eta squared = 0.0003).

Also, the results of the t-test of independent samples showed that there was no difference in success on the individual test constructs between boys and girls. The difference between the mean values by groups on each construct was very small.

#### *Evaluation of the Execution of Lilien Lirs Graphomotor Series*

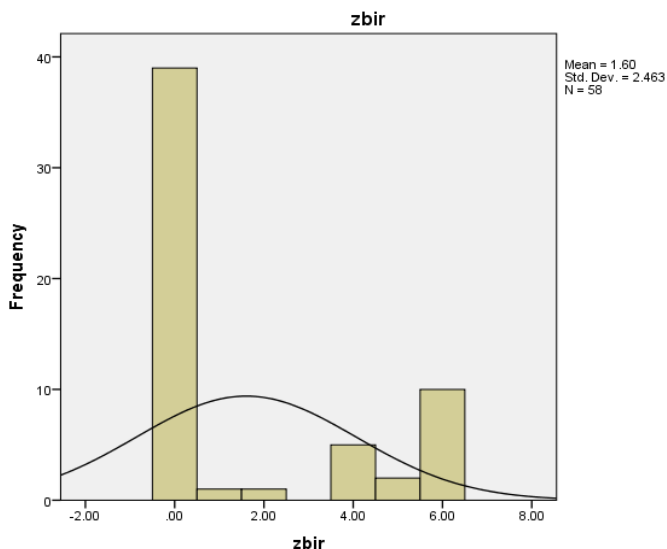
As part of graphomotor evaluation, we assessed the level of motor organization of the sample participants through the execution of Lilien Lirs graphomotor series. The results obtained are shown in Tables 4 and 5, as well as in Graph 2.

Table 4. The success of execution of Lilien Lirs graphomotor series

N	Valid	58
	Missing	0
Mean		1.6034
Median		.0000
Mode		.00
Std. Deviation		2.46334
Minimum		.00
Maximum		6.00
Sum		93.00

Table 5. The success of Lilien Lirs graphomotor series expressed by the frequency of results achieved

Achieved results	Frequency	Percent	Valid Percent	Cumulative Percent
.00	39	67.2	67.2	67.2
1.00	1	1.7	1.7	69.0
2.00	1	1.7	1.7	70.7
4.00	5	8.6	8.6	79.3
5.00	2	3.4	3.4	82.8
6.00	10	17.2	17.2	100.0
Total	58	100.0	100.0	



Graph 2. Graphic presentation of the successful execution of Lillien Lirs graphomotor series

Based on the overall success of Lilien Lirs graphomotor series shown in Tables 4 and 5, as well as in Chart 2, the respondents achieved a total of 93

points, which is 27% of the maximum number of points that could have been achieved on the test (348 points).

Also, the obtained results show that the highest number of respondents (39 or 67.2%) did not score a single point, while only 10 respondents or 17.2% successfully solved the test ( $M = 1.60$ ,  $SD = 2.46$ ).

Having in mind the results obtained, we examined the existence of statistical differences in the success of the Lilien Lirs graphomotor series test between female and male subjects by t-test of independent samples.

The results of the t-test of independent samples showed that there was no difference in success on Lilien Lirs graphomotor series test between boys ( $M = 2.00$ ,  $SD = 2.65$ ) and girls ( $M = 1.00$ ,  $SD = 2.07$ );  $t(56) = -1.530$ ,  $p = 0.113$  (two-sided). The difference between the mean values by groups (mean difference =  $-1.00$ , 95% CI:  $-2.25$  to  $0.25$ ) was small ( $\eta^2 = 0.04$ ).

### *Assessment of Handwriting Dysgraphia*

To evaluate the handwriting dysgraphia of the students' sample, we used a modified Scale for assessment of dysgraphic forms in handwriting by Ajuriaguerra and Ausias. In accordance with the instrument used, the sample of the subjects' handwriting was taken in three types of writing: *dictation*, *transcript*, and *free composition*.

Before presenting the obtained results of assessment of handwriting dysgraphia of the sample students, we must mention that we performed the handwriting dysgraphic evaluation on the sample of handwriting of 22 or 38% of students from a total of 58 sample students. The reason for this is, first of all, the fact that the other 36 or 62% of students could not write the appropriate text on the basis of which the handwriting sample was taken. Also, out of the total number of handwriting samples taken, the assessment of handwriting dysgraphia was performed on 16 or 73% of handwriting samples written in block letters and 6 or 27% of handwriting samples written in cursive.

The results of the evaluation of handwriting dysgraphia based on handwriting samples are presented in Tables 6 and 7.

*Table 6. The results of the evaluation of handwriting dysgraphia concerning gender*

Handwriting	Gender				Total	
	Male	%	Female	%	Students	%
Well* developed (0-9 points)	7	32	2	9	9	41
Ugly handwriting (10-13,5 points)	5	23	3	14	8	36
Dysgraphic handwriting (14 and more points)	1	5	2	9	3	14
Pronounced dysgraphic handwriting (19 and more points)	2	9	-	-	2	9
<b>Total</b>	<b>15</b>	<b>68</b>	<b>7</b>	<b>32</b>	<b>22</b>	<b>100</b>

\*harmonious; delicate; shapely

*Table 7. The results of the evaluation of handwriting dysgraphia in relation to grade and gender*

Grade	Sex	Handwriting				Total	
		Well developed (0-9 points)	Ugly handwriting (10-13,5 points)	Dysgraphic handwriting (14 and more)	Pronounced dysgraphic handwriting (19 and more)	No.	%
I	M	-	-	-	-	-	-
	F	-	-	-	-	-	-
II	M	-	-	-	-	-	-
	F	1	-	-	-	1	4,5
III	M	-	-	-	-	-	-
	F	-	-	1	-	1	4,5
IV	M	-	-	-	-	-	-
	F	-	1	1	-	2	9
V	M	-	2	-	-	2	9
	F	-	-	-	-	-	-
VI	M	-	2	-	-	3	14
	F	-	1	-	-	-	-
VII	M	1	1	-	1	5	23
	F	1	1	-	-	-	-
VIII	M	6	-	1	1	8	36
	F	-	-	-	-	-	-
Total		9	8	3	2	22	100

### DISCUSSION

On the basis of the overall success achieved on the Prediction test for dysgraphia "Edge Ornament" (shown in Tables 2 and 3, as well as in Chart 1), and related to the assessment of the visual perception of order, shape and size of the figures by the respondents, we can conclude that the respondents achieved significantly lower results than the possible maximum, both on individual test constructs and within the test as a whole. Achievement in the test as a whole is just over half of the maximum points, that is, a total of 463 points was achieved, which is 53% of the maximum number of points that could have been achieved in the test (870 points).

The obtained results show that a large number of subjects (24 or 41.4%) did not score a single point on the Prediction test for dysgraphia, while only 21 subjects or 36.2% successfully completed the test ( $M = 7.98$ ,  $SD = 7.062$ ). These results suggest that nearly half of the students with disabilities attending primary school do not have adequate readiness for initial writing classes.

Also, based on the results obtained by the respondents who were solving the Prediction test for dysgraphia, it can be concluded that the surveyed sample students constitute a very heterogeneous group of students

because the obtained results indicate a large dispersion of the results ( $SD = 7,062$ ) relative to the obtained mean. Such a composition of students imperatively also requires respect for identified individual differences through the individualization of organization and conducting of teaching, in this particular case, of teaching initial writing.

Taking into account the results obtained, we tested the existence of statistical differences in test success between female and male subjects by the t-test of independent samples, both in terms of total results achieved and in terms of success on individual test constructs (order, shape, size of figures, drawing around the edge and finishing the drawing). Although girls scored better on average on the Prediction test for dysgraphia ( $M = 8.13$ ,  $SD = 6.98$ ) than boys ( $M = 7.88$ ,  $SD = 7.21$ ), the t-test results show that there is no statistically significant difference between the mean values by groups.

Also, the results of the t-test of independent samples showed that there was no difference in success on the individual test constructs between boys and girls. The difference between the mean values by groups on each construct was very small.

As part of the graphomotor evaluation, we assessed the level of motor organization of the sample participants through the execution of the Lilien Lirs graphomotor series.

The results of the conducted research (shown in Tables 3 and 4, as well as in Graph 2) show that the respondents achieved significantly lower results than the maximum possible on the execution of the graphomotor series. Achievement in the test as a whole is just under a third of the maximum points, that is, the total of 93 points was achieved, which is 27% of the maximum number of points that could have been achieved in the test (348 points). Also, the results show that almost two-thirds of the respondents (39 or 67.2%) did not score a single point, while only 10 respondents or 17.2% successfully completed the test ( $M = 1.60$ ,  $SD = 2.46$ ). These results further suggest that nearly half of students with disabilities attending primary school do not have adequate readiness for initial writing classes.

Having in mind the results obtained, we examined the existence of statistical differences in the success of the Lilien Lirs graphomotor series test between the female and male subjects by t-test of independent samples. Although on Lilien Lirs graphomotor series test, boys scored better on average ( $M = 2.00$ ,  $SD = 2.65$ ) than girls ( $M = 1.00$ ,  $SD = 2.07$ ), the t-test results show that there is no statistically significant difference between the mean values by groups.

Also, the results indicate that most students with disabilities, regardless of calendar age, are only at the stage of the first period of the development of handwriting (*the so-called pre-calligraphic phase*), which refers to the age of children before school.

To evaluate the handwriting dysgraphia, we used a modified Scale for assessment of dysgraphic forms in handwriting by Ajuriaguerra and

Ausias. In accordance with the instrument used, the sample of respondents' handwriting was taken in three types of writing: *dictation*, *transcript*, and *free composition*.

The evaluation of the handwriting dysgraphia, as noted above, was performed on the sample of handwriting of 22 or 38% of the total of 58 sample students. The reason for this is, first of all, the fact that the other 36 or 62% of the students could not write the appropriate text on the basis of which the handwriting sample was taken. Also, out of the total number of handwriting samples taken, the assessment of handwriting dysgraphia was performed on 16 or 73% of samples written in block letters and 6 or 27% of samples written in cursive.

By evaluating the handwriting dysgraphia (Table 6), we found that out of a total of 22 handwriting samples, 9 students or 41% had well-developed handwriting. In 8 or 36% of the students, the presence of ugly handwriting was estimated. Also, an assessment of handwriting dysgraphia revealed that 3 or 14% of the subjects had dysgraphic handwriting, while 2 or 9% had pronounced dysgraphic handwriting.

Based on the results presented in Table 7, we can conclude that dysgraphia is more common in boys (14%) than girls (9%). This result is in line with the results of previous studies (admittedly performed on a sample of typically developed children) in which a more frequent presence of dysgraphia was observed in boys than in girls (Matanović-Mamužić, 1982; Brakus, 2003; Golubović & Čolić, 2010; Golubović, 2012).

Based on the results obtained from our research, it would not be too liberal to conclude that the identified occurrence of dysgraphia in a sample of students with developmental disabilities is due, first of all, to CNS damage, and not a consequence of uneven development of psychomotor coupling structures (developmental dysgraphia). We think that the lack of writing ability, observed in 36 or 62% of sample students, is a consequence of CNS damage. This applies, above all, to students with disabilities attending school who have been enrolled in school since the application of the Law on the Basics of Education and Upbringing System that introduced inclusive education.

When it comes to the evaluation of handwriting dysgraphia in relation to age, the study identified well-developed handwriting in only one student attending grade II. It is a Roma girl who has been educationally neglected. The other 7 students with harmonious development of handwriting attend older grades (2 attend VII grade and 6 attend VIII grade).

The results of the research accurately indicate the developmental characteristics of students with disabilities and imperatively impose the need to provide appropriate complex support planned by IOP in order to master writing as one of their academic skills. Success in mastering the act of writing is based on appropriate principles and exercises that would first individually and then integrally influence the stimulation of those ar-



as where the act of writing rests. Holding longer attention in preparation for initial writing increases both children's safety and their ability to respond to the demands placed on them, thus enabling them to progress gradually. The first principle on the path to introducing children to writing consists in parsing speech to the level of phoneme. This means that the analysis leads to a statement (sentence) which is further broken down into words and, further, a successive sequence of voices in one word. After that, the reverse process of synthesizing voices into a meaningful word is applied. Also, phoneme discrimination and proper articulation of each voice need to be practiced. In addition, it is necessary to develop a visual perception of the basic shapes of the grapheme in the child, mastering the space, position and size of the grapheme, as well as visual memory of the grapheme. To this end, it is necessary to practice with children the disassembly and assembly of letters of different materials, of different sizes, but in recognizable shapes, first by model, and then without it, based on visual memory with appropriate verbal stimuli for association with similar and familiar children objects.

In addition to the above content, which is mainly oriented to perceptual development, it is necessary to plan and organize series of exercises for the child's motor development. To this end, games with as many shaping materials as possible should be used to exercise the fine motor skills of the hands and fingers in children. Also, for the preparatory period of initial writing it is necessary to plan the writing of prescriptive forms over a long period of time.

### *CONCLUSION AND LIMITATIONS*

Based on the results obtained in the conducted research, the following can be concluded:

1. The assumption that the ability to visually perceive order, size, and shape of a figure in children with disabilities of primary school age differs from one another in relation to the sex of children proved to be incorrect. Namely, the results of the t-test showed that there was no difference in success in the Prediction test between boys ( $M = 7.88$ ,  $SD = 7.21$ ), or girls ( $M = 8.13$ ,  $SD = 6.98$ );  $t(56) = 0.128$ ,  $p = 0.899$  (two-sided). The difference between the mean values by groups (mean difference = 0.244, 95% CI: -4.08 to 3.59) was very small ( $\eta^2 = 0.0003$ ).

Also, the results of success in the Prediction test show that the highest number of respondents (24 or 41.4%) did not score a single point, while only 21 respondents or 36.2% completed the test successfully ( $M = 7.98$ , and  $SD = 7.062$ ). These results suggest that this is an extremely heterogeneous group of students, and that nearly half of students with disabilities attending primary school do not have adequate readiness for initial writing classes. This statement implies new conclusions regarding the or-

ganization and conducting of initial writing classes, but also teaching in general, which we will discuss later.

2. The assumption that there are statistically significant differences regarding the gender of children with disabilities of primary school age in relation to the development of graphomotor skills has also proved to be incorrect. Namely, by assessing the level of motor organization of the subjects covered by the sample through the execution of the Lilien Lirs graphomotor series, a total score of 93 points was achieved, which is 27% of the maximum possible number of points that could have been achieved on the test (348 points). In addition, the highest number of subjects (39 or 67.2%) on this test did not score a single point, while only 10 subjects or 17.2% successfully solved the test ( $M = 1.60$ ,  $SD = 2.46$ ).

Having in mind the results obtained, we examined the existence of statistical differences in the success of the Lilien Lirs graphomotor series test between female and male subjects by the t-test of independent samples. The results of the t-test of independent samples showed that there was no difference in success of Lilien Lirs graphomotor series test between boys ( $M = 2.00$ ,  $SD = 2.65$ ) and girls ( $M = 1.00$ ,  $SD = 2.07$ );  $t(56) = -1.530$ ,  $p = 0.113$  (two-sided). The difference between the mean values by groups (mean difference =  $-1.00$ , 95% CI:  $-2.25$  to  $0.25$ ) was small ( $\eta^2 = 0.04$ ).

Such results also point to the fact that in these students there is no specific motor maturity necessary for mastering the act of writing as a precise psychomotor activity. Also, the findings further support our previous conclusion that most students with disabilities who attend a school for children with disabilities do not have the readiness to pursue initial writing.

3. The assumption that children with disabilities are more likely to have problems with writing and dysgraphia has proven to be correct. By assessing the handwriting dysgraphia using the Scale for assessment of dysgraphic forms by Ajuriaguerra and Ausias, we found that out of a total of 22 handwriting samples, 9 students or 41% had well-developed handwriting. In 8 or 36% of students, the presence of ugly handwriting was assessed. Also, by assessing the handwriting dysgraphia, it was found that 3 or 14% of the subjects had dysgraphic handwriting, while 2 or 9% had pronounced dysgraphic handwriting. If we add 36 or 62% of the sample students who could not write the appropriate text on the basis of which the handwriting sample was taken, which could be said to have pronounced dysgraphia, then the picture of the presence of problems with writing and dysgraphia is clearer.

Based on the results of the handwriting dysgraphic evaluation, we found that 3 boys (14%) and 2 girls (9%) have a dysgraphic handwriting, which suggests that dysgraphia is more common in boys than girls.

Based on the results obtained from our research, it would not be too liberal to conclude that the identified occurrence of dysgraphia in a sample of students with disabilities is due, above all, to CNS damage, and not the consequence of uneven development of psychomotor coupling structures (developmental dysgraphia). Also, we find that the lack of writing ability observed in 36 or 62% of sample students is due to CNS damage. This applies, above all, to students with disabilities attending school who have been enrolled since the implementation of the Law on Basics of Education and Upbringing System introducing inclusive education. Therefore, with the introduction of inclusive education since 2010, most children who do not have the necessary minimum abilities to master writing skills as one of their academic skills, were enrolled at "Vule Antić" School in Vranje. Bearing in mind the mentioned statement and the fact that the curriculum for regular elementary schools is applied with these students, the question arises as to whether the planned contents of teaching initial writing, and consequently the teaching of Serbian language, can be achieved or not, and to what extent? The answer to the question, according to the results of our research, indicates the significant presence of difficulties in adopting writing by children with disabilities, as well as the inability to adopt it in majority of children. However, confirming or denying this answer requires new and broader research of this issue on a larger and representative sample. The mentioned statement also indicates some limitations in the research we have done. Therefore, the basic limitation of the conducted research is reflected in the size of the sample, as well as in the inability to compare the obtained results with other surveys, because we could not find the same or similar ones.

Effective teaching of students with disabilities, according to the results obtained, imperatively imposes the need to respect the developmental characteristics of this student population and to individualize the initial teaching of writing. This entails major changes to the standards and outcomes of achievements required by the regular curriculum and the development of an IOP for each student with more complex individualized contents to support the child's adoption of writing. However, it would not be too liberal to say that working effectively with them also entails the need to adopt specific curricula intended for teaching in schools for students with disabilities.

Finally, we would conclude our consideration within this section of the paper by stating that future research of the selected problem should eliminate the abovementioned shortcomings and include among other things, the problems and opportunities to acquire other academic skills for children with disabilities of primary school age.

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## ПИСАЊЕ КОД ДЕЦЕ СА СМЕТЊАМА У РАЗВОЈУ

Луција Ђорђевић<sup>1</sup>, Србољуб Ђорђевић<sup>2</sup>, Љиљана Митић<sup>2</sup>

<sup>1</sup>ШОСО „Вуле Антић”, Врање, Србија

<sup>2</sup>Универзитет у Нишу, Педагошки факултет у Врању, Врање, Република Србија

### Резиме

Графомоторне способности, визуелна перцепција и издиференцирана употребна латерализованост представљају битне предуслове за овладавање писањем, као једном од академских вештина која се усваја на основношколском узрасту. Ове способности се почињу развијати још у раном детињству. На путу овладавања наведеним способностима проблем постаје већи уколико дође до одступања од миљоказа развоја, насталих присуством моторичких, слушних, визуелних, говорно-језичких, интелектуалних поремећаја, поремећаја у понашању или вишеструких поремећаја. Ова деца, ограничена постојањем примарног поремећаја, значајно теже од својих вршњака типичне популације усвајају академска знања и вештине. Предмет нашег истраживања био је да се испита стање писања код ученика основношколског узраста са сметњама у развоју, као и тешкоће које се јављају код ученика на путу овладавања овом академском вештином. Узорак истраживања чинило је 58 ученика (од чега 23 женског пола) основношколског узраста са сметњама у развоју. У извршеном истраживању коришћена је техника тестирања, а од инструмената Предикциони тест за дисграфију „Рубни орнамент”, Графомоторни низ „Лилијен Лирс” и Скала за процену дисграфичних форми у рукопису. Добијени резултати показују да велики број испитаника (24 или 41,4%) није остварио ниједан поен на Предикционом тесту за дисграфију, док је само 21 испитаник или 36,2% успешно решио тест ( $M = 7,98$ , а  $SD = 7,062$ ). Резултати т-теста независних узорака показују да не постоји разлика у успеху на Предикционом тесту између дечака ( $M = 7,88$ ,  $SD = 7,21$ ), односно девојчица ( $M = 8,13$ ,  $SD = 6,98$ );  $t(56) = 0,128$ ,  $p = 0,899$  (обострано). Разлика између средњих вредности по групама (просечна разлика =  $0,244$ , 95% CI:  $-4,08$  до  $3,59$ ) била је врло мала (ета квадрат =  $0,0003$ ). Такође, добијени резултати показују да највећи број испитаника (39 или 67,2%) није остварио ниједан поен на тесту Лилијен Лирс, док је само 10 испитаника или 17,2% успешно решило тест ( $M = 1,60$ ,  $SD = 2,46$ ). Резултати т-теста независних узорака показују да не постоји разлика у успеху на тесту извршења графомоторног низа Лилијен Лирс између дечака ( $M = 2,00$ ,  $SD = 2,65$ ), односно девојчица ( $M = 1,00$ ,  $SD = 2,07$ );  $t(56) = -1,530$ ,  $p = 0,113$  (обострано). Разлика између средњих вредности по групама (просечна разлика =  $-1,00$ , 95% CI:  $-2,25$  до  $0,25$ ) била је мала (ета квадрат =  $0,04$ ). Процентом дисграфичности рукописа применом Скале за процену дисграфичних форми у рукопису Ажиригере и Озиаса утврдили смо да од укупно 22 узорка рукописа код 9 ученика или 41% постоји складно развијен рукопис. Код 8 или 36% ученика проценом је утврђено присуство ружног рукописа. Такође, проценом дисграфичности рукописа је утврђено да дисграфичан рукопис има 3 или 14% испитаника, док 2 или 9% испитаника има изражено дисграфичан рукопис. Ако овом броју додамо и 36 или 62% ученика узорка који нису могли да напишу одговарајући текст на основу кога се узима узорак рукописа, за које се може рећи да имају изражену дисграфију, онда слика о присуству проблема са писањем и дисграфијама бива јаснија. На основу извршеног истраживања, закључујемо да ефикасан наставни рад са ученицима са сметњама у развоју, сходно добијеним резултатима, императивно намеће потребу пошто-

вања развојних карактеристика ове популације ученика и индивидуализацију почетне наставе писања, као и знатне измене стандарда и исхода постигнућа који се захтевају по редовном наставном плану и програму. Међутим, не би било преслободно рећи да ефикасан рад са овом популацијом ученика подразумева и потребу доношења и посебних наставних планова и програма намењених за наставни рад у школама за ученике са сметњама у развоју.





**ПОЛИТИКА, ПРАВО И БЕЗБЕДНОСТ**  
**POLITICS, LAW AND SECURITY**



## CYBERSECURITY – VIRTUAL SPACE AS AN AREA FOR COVERT TERRORIST ACTIVITIES OF RADICAL ISLAMISTS

Darko Trifunović\*

University of Belgrade, Faculty of Security Studies, Belgrade, Serbia

### Abstract

Over time, terrorism has evolved into different forms. One of the most dangerous is certainly cyber terrorism. There are many different motivations for terrorists to deploy cyber terrorism as a tool in their fight. Internet and computer networks are powerful resources on which contemporary society relies heavily. Terrorist groups have developed new tools and methods of the fight and they have become more effective, efficient, and unpredictable. Virtual, or cyberspace, is perfect and very safe ground for terrorist groups' various activities, such as secret encrypted communication, file sharing, indoctrination and recruitment of vulnerable individuals, fundraising and promotions of their future actions and accomplishments spreading fear among common people. Are we adequately aware of these facts and prepared for countermeasures? The fact is that terrorists use mostly open-source tools (software) for their purposes, widely available and free of charge, as well as video games, popular social networks (mostly Twitter), and software developed by their programmers. The purpose of this paper is to point out some of the methods radical Islamic terrorist groups have been using and underline the importance of responding to this new security challenge.

**Key words:** cyber terrorism, Islamic terrorists, Anonymous, steganography, the Islamic state.

## САЈБЕР БЕЗБЕДНОСТ – ВИРТУЕЛНИ ПРОСТОР КАО ПОДРУЧЈЕ СКРИВЕНИХ ТЕРОРИСТИЧКИХ АКТИВНОСТИ РАДИКАЛНИХ ИСЛАМИСТА

### Апстракт

Тероризам се током времена развио у различите облике. Један од најопаснијих је засигурно сајбер тероризам. Много је различитих мотивација за терористе да приме-не сајбер тероризам као оруђе у својој борби. Интернет и рачунарске мреже моћан су ресурс на који се модерно друштво увелико ослања. Терористичке групе развиле

\* Аутор за кореспонденцију: Дарко Трифуновић, Факултет безбедности,  
Господара Вучића 50, 11118 Београд, Србија, galileja@yahoo.com

су нове алате и методе борбе и постале су ефикасније, унапређеније и непредвидљивије. Виртуелни или сајбер простор савршен је и врло сигуран терен за терористичке групе, њихове разне активности, као што су тајна шифрована комуникација, дељење датотека, индоктринација и регрутовање рањивих група, прикупљање средстава и промоција њихових будућих акција и достигнућа која шире страх међу обичним људима. Да ли смо довољно свесни ових чињеница и спремни за контрамере? Чињеница је да терористи у своје сврхе користе углавном алате отвореног кода (софтвер), широкодоступне и бесплатне као и видео-игре, популарне друштвене мреже (углавном Твитер) и софтвер који су развили њихови властити програмери. Сврха овог рада је да се укаже на неке методе које користе радикалне исламистичке терористичке групе и на важност реаговања на овај нови безбедносни изазов.

**Кључне речи:** сајбер тероризам, исламски терористи, Анонимуси, стеганографија, Исламска држава.

## *INTRODUCTION*

Over the years, cyberspace has become an integral part of our lives. But also, what is more than notable is that this new ground, full of possibilities, is constantly under different attacks. Spies, criminals, state-sponsored hackers, are looking for efficient ways to penetrate computer systems to fulfill different objectives. These goals could be gaining illegal financial funds, stealing business or private information, industrial secrets, etc. Also, cyberspace can be used for sabotage activities, to conduct future war conflicts, or to transmit political, ideological, religious messages and propaganda. Over the years, these resources have become an increasingly powerful tool for radical Islamic terrorists who are using them to achieve their objectives. Cyberspace is also the place where their accomplishments and activities can be stopped. There are many different motivations for terrorists to deploy cyber terrorism as a tool in their fight to inflict damage or destruction to targets. Since cyberspace is borderless, attacks can originate anywhere in the world and are not limited by physical boundaries. Like any other form of terrorism, cyber terrorism is potentially a major global threat. This might be a serious threat that could endanger states and citizens. Terrorists, members of various radical Islamic organizations, have started using information technologies and the Internet increasingly. They have been using it as an instrument of the fight, but also as the target of the attack. This is a global problem and requires global attention. And yet, there is still no universal consensus about the definition or exact acts in cyberspace that could be listed as acts of cyber terrorism. Moreover, on the global level, academic and security experts have still not reached a unified definition of this illegal activity. Terrorism, as a method of radical Islamic groups, is motivated by political objectives since they seek political power to compel society to conform to their extreme religious views. Therefore, it is important to underline and understand the better relationship between politics, religion, and society (Jevtić, 2017). Although there is no uni-

versal definition of cyber terrorism, security experts, academics, the IT sector, and politicians provide a myriad of definitions in an attempt to define it and it is quite noticeable that there are conflicting viewpoints on the term itself. Professor Dorothy Denning, one of the pioneers in the definition of cyber terrorism, argues that a particular act can be characterized as cyber terrorism if the attack results in violence against people or property, or causes damage that will cause fear (Denning, 2000). According to Denning “computer is the weapon of attack” in this case. Denning states that to understand the potential threat of cyber terrorism, two factors must be considered: first, whether there are targets that are vulnerable to the attack that could lead to violence or severe harm, and second, whether there are actors with the capability and motivation to carry them out.

The U.S. Federal Bureau of Investigation (FBI) defines cyber terrorism as any “premeditated, politically motivated attack against information, computer systems, computer programs, and data which result in violence against non-combatant targets by sub-national groups or clandestine agents” (Tafoya, 2011). According to the U.S. Commission of Critical Infrastructure Protection, possible cyber-terrorist targets might include the banking industry, military installations, power plants, air traffic control centers, water systems, etc. On the other hand, professor Gabriel Weimann claims that cyber terrorism is used for recruitment, propaganda purposes, and gathering support through websites (Weimann, 2011).

Cyber terrorism is a threat to the international community as much as any other forms of terrorism (Iklody, 2010). The fact is that both cyber terrorists and terrorists share the same political, ideological, and religious motives. What distinguishes them is a different type of tool and the different effects. In the case of cyber terrorists, those are the computer and the Internet. Cyber, as well as “classic terrorism”, aims to attack and intimidate civilians by using computers, computer networks, and the Internet with the motive of spreading its ideals and political struggle (Arquilla & Ronfeldt, 2001).

The paper will explore the active use of cyberspace of extreme terrorist groups of radical Islamists for their goals. Terrorists are using cyberspace increasingly and there is possibly a great threat that the Internet and IT will play a significant role in the potential mass carnage and destruction through technological means by terrorist groups.

### *TOOLS AND METHODS FOR COVERT CYBER ACTIVITIES*

There are numerous ways and tools by which terrorists use the Internet for communication, without fear that somebody might intercept them. Terrorists use the biggest advantage of cyberspace – anonymity – and different tools and methods to make strategies and plans for future attacks, but also to contact and activate their sleepers, to exchange important files, etc.

One of the most popular tools is the Tor network (The Onion Router). This is the most popular anonymizer software. The main advantage of this software is that it offers a technology that bounces internet users and website traffic through “relays” run by thousands of volunteers around the world. Thanks to its architecture, it renders it extremely hard for anyone to identify the source of the information or the location of the user. It is widely used by thousands of people who take care of their privacy, including journalists, the business sector, activities, different security agencies, etc. But also, it is more than popular among terrorist groups such are Al Nusra, Al-Qaida, ISIS, and others as well.

Tor hides the user’s real IP address and changes it frequently for the fake one. Its main purpose is to hide the real identity of its users. Tor has its Darknet and that is a safe place for any kind of illegal activities. A Study published by NATO showed that there were about 300 forums of terrorist organizations in Tor’s darknet (Ogun, 2015)

Tor can mask users’ identities, but also host their websites via its “hidden services” capabilities, which is more than convenient for illegal activities and terrorists. Also, sites can only be accessed by people on the Tor network. Nowadays, there are speculations about Tor safety, since IT researchers found vulnerabilities that might be used for the de-anonymization of its users. However, there is still a need for further investigation of Tor’s Darknet, but also deeper and better cooperation of law enforcement agencies around the world to track and prevent potentially illegal activities in this “hidden” place on the Internet.

I2p Darknet is another less popular Darknet but considered more secure than Tor (Akhgar, Bayerl & Sampson, 2016). Tor has a two-direction focus, on a clear/public net hiding identities of users and the focus on the Darknet, but the focus of I2p is only on the Darknet which is Encrypted Internet hidden in public/clear Internet. Its users can surf the public Internet much like Tor users, but that is a security issue and users mostly do not use it for that purpose. I2p in combination with other software can provide a perfectly secure way of communication through encrypted tunnels. Retroshare is another kind of software that can be used inside I2p Darknet connecting as many people as needed. Using Retroshare, users make hidden nodes of the network inside I2p Darknet and connect them, peer, to peer making encrypted tunnels between their computers. Interception of that way of communication is impossible at this point. No one can see the identities of participants and the content of the communication.



Cyber-attacks are one of the most serious security challenges in the 21<sup>st</sup> century. Hackers have already demonstrated weaknesses of the different systems by taking over control of crucial services, stealing sensitive information, or jeopardizing functions. The concern is that terrorists could also start applying these methods which could be a great security threat.

The question is whether cyber terrorism nowadays is a real danger. Islamic terrorists have their own software developing companies that make encrypted software for their purposes. The main software producers are GIMF (Global Islamic Media Front) and FTC (Al-Fajr Technical Committee) (Axelrod, 2009).

Here is a timeline of software that ISIL, Al-Qaida, and other Islamic terrorist organizations have developed over the years:

- The original *Mujahideen Secrets (Asrar al-Mujahideen)* encryption software launched in 2007, primarily for use with email. Asrar has had multiple releases over time and is distributed by the Global Islamic Media Front.
- *Asrar al-Dardashah*, released by GIMF in February 2013, is an encryption plug-in for instant messaging based on the Pidgin platform – which connects to major US-based platforms.
- Tashfeer al-Jawwal is a mobile encryption program, again from GIMF, released in September 2013, based on Symbian and Android.
- *Asrar al-Ghurabaa* is yet another alternative encryption program, however, importantly, released in November 2013 by the Islamic State of Iraq And Al-Sham (ISIS), which coincides with ISIS breaking off from main AQ after a power struggle
- *Amn al-Mujahid* is an alternative encryption program released in December 2013. In this case from Al-Fajr Technical Committee (FTC) is also a mainstream AQ outfit.
- *Al-Fajr*, one of Al-Qaeda’s media arms, released a new Android encryption application early June 2014 on their website, referring to how it follows the “latest technological advancements” and provides “4096-bit public key” encryption (Table 1).

Table 1.

Product	Release Date	Organization	Key Feature	Execution Platform	Messaging Platform	Crypto Method	Delivery 
Mujahideen Secrets (Asrar al-Mujahideen)	2007	GIMF (AQ main)	Encryption of messages or file exchange	Windows with recent instructions for Mac porting	Primarily email	Public/Private key, RSA based, 2048 bit	Windows app
Asrar al-Dardashah	February 6, 2013	GIMF (AQ main)	Encryption of instant message traffic	Pidgin platform, Windows installer	Messaging (Pidgin): Yahoo, Google, AOL, etc.	Based on Mujahideen Secrets encryption	Pidgin plugin
Tashfeer al-Jawwal (Mobile Encryption Program)	September 4, 2013	GIMF (AQ main)	Encryption of SMS traffic	Android/Symbian	SMS	Twofish, use SSL for transport	Android/Symbian apps 
Asrar al-Ghurabaa	November 27, 2013	ISIS (AQ adversary)	Pure text encryption	Website, accessible via Tor	Platform independent, just encrypts	"A special or unique encryption algorithm"	Website
Amn al-Mujahid	December 10, 2013	Al-Fajr Technical Committee (FTC)	Text encryption	Windows OS	Email, SMS, instant messaging	AES/Twofish	Windows app
Amn al-Mujahid (Mobile)	June 7, 2014	Al-Fajr Technical Committee (FTC)	Text encryption	Android	SMS	AES/Twofish	Android app

## STEGANOGRAPHY

Besides the software mentioned above, one of the most popular techniques that terrorists widely use for secret communication and hidden messaging is steganography. Terrorist groups scramble their messages by applying open-source encryption programs that involve steganography techniques, and post hidden messages on existing photographs, text, or videos on almost any website or to directly send via e-mail (Trifunović, 2015). In short terms, steganography is a method of hiding a secret message in a public container or other words, putting messages inside pictures, pdf documents, videos, or almost any other format<sup>1</sup>. The implementation of the secret message and container is on a binary level. Steganography is widely used as a very sophisticated way of secret communication and it is almost impossible to detect. It provides a way of secret communication that is common to Islamic terrorists. Steganography is more subtle and more effective compared to encryption and could be combined with encryption as well (Trifunović, 2015).

It comes as no surprise that terrorist groups such as the Islamic State, Hezbollah, Hamas, and Al Qaeda, have been using emails, encryption, and steganography to support the work of their organizations and communication between members. There are numerous examples of terrorist attacks prepared and accomplished using this method. According to a former French defense ministry official, Islamic terrorists used steganography to prepare an attack on the United States embassy in Paris. He said that terrorists were instructed to communicate through pictures posted publicly on the Internet (Kolata, 2001).

Jamal Beghal, the leader of that terrorist plot and one of Al-Qaida's leading recruiters in Europe, was arrested in late July 2001. The reason for the arrest was a passport fraud at Dubai International Airport in the United Arab Emirates. Beghal was trying to travel back to Europe after receiving training in Afghanistan. After French intelligence agents' interrogation, he revealed details of the plot – the plan was to build a bomb out of sulfur and acetone and to destroy the embassy of the United States in Paris. The former professional football player in Germany, Tunisian Nizar Trabelsi was the designated suicide bomber. He planned to strap this bomb onto himself, cover it up with a business suit and detonate himself in the U.S. embassy. Then, a minivan full of explosives would be driven into the U.S. cultural center of Paris and the explosives would be detonated inside. Beghal was convicted in

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<sup>1</sup> With the help of open source software, based on steganography technique, anyone can easily hide secret messages or malicious scripts into any digital format, such as: BMP, JPG, TXT, HTML/XML, PDF, PNG, GIF, AU, WAV, MP3, AVI, TIF, TGA, DLL and EXE. This technique manipulates the least significant bit of the pixels making up digital images to store hidden information.



March 2005 on terrorism charges and was sentenced to 10 years' imprisonment. He was released in 2009 but put under house arrest.<sup>2</sup>

The next case of using this technique by Islamic terrorists was revealed when in May 2011 a suspected al-Qaeda member, Maqsood Lodin, a 22-year-old Austrian was arrested. Lodin was traveling from Pakistan to Berlin via Hungary when German police detained him. The police officers found a USB memory stick on him. The USB was password protected. The information on it was invisible. After deep analysis, officers discovered that the USB stick was containing a video with pornographic content – “Kick Ass” and the file was marked under the name “Sexy Tanja”.

Computer forensics experts from the German Federal Criminal Police extracted 141 hidden text files out of the videos detailing al-Qaeda operations and plans for future operations (Gallagher, 2012). Those documents contained plans to attack cruise ships as a distraction while other attacks were initiated in Europe, then PDF terrorist training manuals in German, English, and Arabic were found as well. Those files were just hidden inside with digital steganography technique, but not encrypted. Anyway, German specialists worked for several weeks to extract all hidden data. If those files were encrypted strong enough as well, it would have been much harder or even impossible to get readable content because it would give a second layer of protection. U.S. intelligence sources tell CNN that the documents uncovered are “pure gold” (Robertson, Cruickshank & Lister, 2012). One source says that they are the most important haul of al Qaeda materials, besides those found when U.S. Navy SEALs raided Osama bin Laden's compound in Abbottabad, Pakistan, in 2011 and killed the al Qaeda leader (Robertson et al., 2012).

Steganography combined with strong cryptography is a perfect and unbreakable way of secret communication. If those techniques are applied in Darknet, we would have a paranoid level of completely safe communication. That is why the members of different security sectors need to learn how to use steganography as well as other techniques for encryption. To fight terrorists on the Internet, it is imperative to know their strategies. Hence the need to stop possible cyber-terrorist acts of large dimensions is getting more important each day. It is also more than necessary for experts from different fields and countries to work together and deal with the issues of terrorists misusing the Internet and cyberspace in a joint effort.

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<sup>2</sup> Beghal was one of the links between ChérifKouachi, one of the brothers behind the Charlie Hebdo massacre in 2015, and AmedyCoulbaly, who killed four hostages in a Paris kosher supermarket and also a policewoman.

*ONLINE RECRUITMENT AND RADICALIZATION  
OF ISLAMIC TERRORISTS*

Access to the Internet has become increasingly important for terrorists. Modern ways of communication have given terrorists the ability to facilitate the organization of groups. Radical Islamic terrorists successfully implement the recruiting of new members using modern ways of communication. Internet and social media platforms secure membership without directly approaching potential recruits across the world as it used to be done only a decade ago. What is more than obvious is that the target group for recruitment has become children (De Guttry, Capone & Paulussen, 2016). Child terrorists are getting recruited in different forms – via direct contact, the propaganda on social media from which they get inspiration, and even by playing computer games which are more than worrying and extremely dangerous.

Internet is terrorists' main tool for the recruitment and radicalization of vulnerable individuals all around the world. The most vulnerable ones are migrants from Syria, Iraq, Afghanistan, and other Muslim countries. They experienced the terror of war, lost their loved ones, traveled thousands of kilometers struggling to pass the borders, etc. These are the recruiters' main targets. In Germany, authorities reported 340 cases in which extremists tried to make contact with asylum seekers since October 2015. German interior ministry warned that jihadist sympathizers were targeting child asylum-seekers as potential recruits (European Union Agency for Fundamental Rights, 2016).

There are examples of successful recruitment. One of them is a 16-year-old Syrian refugee, Mohamed J. who was arrested at a refugee shelter in Cologne last year. Mohamed was in contact with an ISIS member from the Middle East who instructed him on how to make an explosive device and where to plant it (Huggler, 2016). In December, a 12-year-old German Iraqi boy — guided by an Islamic State contact in the Middle East who warmly addressed him as “brother” and groomed the boy via the encrypted messaging app, Telegram — built and tried to detonate a bomb near a shopping center in the western German city of Ludwigshafen. The device failed to explode (Anthony & Mekhenne, 2017).

In January 2017, a 15-year-old girl — the daughter of a German convert to Islam and a Moroccan mother — was sentenced to six years in prison for an attack last February on a German police officer in Hanover (Hall, 2017). She gouged him in the neck with a kitchen knife, causing life-threatening injuries after being befriended and cajoled by an Islamic State instructor via a text messaging service. It should be underlined that she was radicalized at the age of 7. Intelligence agencies here have identified at least 120 minors who have become dangerously radicalized — and some of them cannot be intensely monitored because of domestic laws protecting children, according to the officials (Anthony & Mekhenne, 2017).

As already mentioned earlier, terrorist recruiters use shooting video games to radicalize young people, especially children. The Islamic State has reached unprecedented success when it comes to this activity. In 2012, one of the world's most popular video games was Grand Theft Auto. The Islamic State propaganda machinery created its modifications. Players could role-play as members of IS engaged in combat on the battlefield. Players, as IS soldiers could be killing and shooting American soldiers and attack convoys, with lots of explosions (Clauson, 2014).

Two young British citizens were recruited by ISIL using Call of Duty. Their father, Ahmed Muthana refused to buy sons Nasser, 20, and Aseel, 17, copies of the first-person shooter game, but they managed to reach a copy of their own. Their father believes that the game was bought for them by the people who encouraged them to go to Syria. Nasser, who was a medical student, left Cardiff after borrowing £100 from his father, saying he was going to a Muslim conference in Shrewsbury. Instead, he flew to Syria to join IS rebels, formerly known as ISIS. His younger brother Aseel quit his studies at Cardiff Fitzalan High School. He is fighting in Syria while his older brother is in Iraq (Evans, 2014).

Another example of using video games for terrorist propaganda is using GTA 5. ISIS produced a game intro where Jihadists scream “Allahuakbar” while shooting and burning citizens alive<sup>3</sup>.

### *CYBERWAR OF INDEPENDENT INTERNET COLLECTIVE ANONYMOUS AGAINST ISLAMIC TERRORISTS*

Islamic State or ISIL became the dominant terrorist group when it comes to various activities in cyberspace, especially when it comes to propaganda, recruitment, fundraising the potential fear that hackers of the group could manage to successfully attack the national infrastructure of the “enemy” states by using sophisticated cyber-attacks. Fighting terrorist groups should include the fight on the ground, from the air, from the sea – and in cyberspace. There are a couple of Internet hacker groups fighting against Islamic terrorists in cyberspace. The most active ones are GhostSec and one of the most popular, most organized, and very well IT equipped hacker collectives known as Anonymous. Anonymous declared war against ISIS in 2015 after the Paris attacks (Aydinli, 2016). The hacker collective, which consists of unconnected volunteers, coders, and activists from around the world, launched its anti-Islamic State online campaign, called #OpISIS, after the Charlie Hebdo massacre in Paris in January 2015 (Lockhart, 2015). The main focus of the Anonymous collective is the disruption of terrorist

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<sup>3</sup> Available at: <https://www.youtube.com/watch?v=604aev03MzM> Retrieved, February 2017

communication with the public shutting down of their Twitter accounts, Facebook pages, Telegram channels, etc (Anonhq, 2015).

Anonymous' efforts have encompassed recruiting its online army of people devoted to identifying and shutting down the militant group's avenues of propaganda Anonhq (2015). The collective recently released instruction guides to help spread information about the basics of denial-of-service attacks on websites and password cracking, as well as for instructions on how to create programs that identify Twitter accounts related to the Islamic State group and how to help Anonymous find terrorist-propaganda sites (Gilbert, 2015). Websites related to the militant group have been gravitating towards the dark Web, a region of the Internet whose constituents do not appear in the results of search engines and typically require login information, so Anonymous has been attempting to find and infiltrate these sites. An Anonymous sibling known as either Ghost Security or GhostSec took down a site associated with the Islamic State group on the Dark Web Friday, replacing calls for jihad against the infidels with an advertisement for an online pharmacy peddling Prozac and Viagra, as well as a snarky message to readers (Stainer, 2015).

Anonymous collective have taken down 149 Islamic State-related websites and exposed 101,000 Twitter accounts and 5900 propaganda videos (Khandelwal, 2015). Also, they have successfully mapped countries with the most ISIS supporters' Twitter accounts.

### *ISIS HACKER UNITS FOUNDER DRONED*

A member of the hacker team TeaMp0ison, Junaid Hussain aka Trick who was arrested for hacking the email account of a staffer of the former UK Prime Minister Tony Blair and posted personal information of Blair's, as well as other government employees online, got radicalized and joined ISIS (Murphy, 2015). He became the group's most prominent hacker and the third person on the Pentagon's kill list after Jihadi John and the leader of ISIS Abu Bakr al-Baghdadi.

In Syria, where he arrived in 2013, Hussain initially became known for allegedly hacking the Twitter account of CENTCOM, though it has been reported that somebody else was behind that attack and the hacking group known as Cyber Caliphate (Guardian, 2015a). Hussain, however, was likely the leader, and perhaps the sole member, of another ISIS-linked hacking group known as the Islamic State Hacking Division, or IS Hacking Division (Spencer, 2015). His most important legacy is that he created the image of the powerful Islamic State in cyberspace. He was the one who had exceptional IT skills and very possibly, he had all the credit when it comes to IS's overtaking social media. He had the opportunity to recruit talented IT hackers to work in IS favor. But, although he was the public face of the Cyber Caliphate, he did not manage to accomplish the goal – creating a true, powerful,

united cyber army of hackers who would be capable of attacking, destroying, or gaining the command and control systems of critical infrastructure.

Hiding behind the name of the IS Hacking Division, Hussain posted the names and personal information of 100 US military members, claiming to have obtained it from hacking Pentagon servers, though he likely got it most directly from the website. More importantly, he published the personal information of 1,400 American government workers, information likely culled from older breaches or open-source information (Alkhouri, Kassirer & Nixon, 2016:7).

Allegedly, the information of American personnel was delivered to Hussein by Kosovo citizen Ardit Ferizi, aka “Th3Dir3ctorY” who is believed to be the leader of the hacking collective “Kosova Hacker’s Security” (Mickolus, 2016:458). But Hussain was not just pretending to dox government employees, or break into Twitter accounts for propaganda purposes. He developed a custom internet spy tool for ISIS (Coker, Yadron, & Palette, 2015), hacked into military members’ Facebook accounts, and led the group’s online recruitment. He was also allegedly involved in recruiting bombers in Western countries (Franceschi-Bicchierai, 2015).

Authorities knew Trick was somewhere in Raqqa, the *de facto* IS capital, though nailing down his exact location was a challenge. But unlike many others in ISIS, Trick had a heavy social media presence and was very active online. Britain’s GCHQ got Trick’s username on messaging app Surespot and its agent sent him a friend request that he accepted (Guardian, 2015b). This undercover agent, which has not been named in various stories in the British press, is believed to be a friend and a fellow hacker named Shm00p who wrote on Twitter, “F\*\*\*ing guilty [of being an informant],” he wrote. “And I’m sorry. I played their game and I shouldn’t have.” At some point, this undercover agent sent Trick a link to an unknown webpage known as a “waterhole.” It is called that because waterhole attacks involve “poisoning” the code on a website so that when a user visits, it will take over a system or modify it. In Trick’s case, the page downloaded a virus to his phone. It is based on that that Surespot wrote of the incident. Subsequently, he made a phone call from his home in Raqqa that gave GCHQ the ability to pinpoint his location. The 21-year-old hacker was killed by a drone outside Raqqa in August 2015 (Szoldra, 2016).

### *SERBIAN ANONYMOUS JOINED FIGHTS AGAINST JIHADISTS*

The Republic of Serbia has problems with Islamic extremists as well, especially in its southern region called Raška. The Serbian Anonymous collective has done its part in Operation ISIS in this region. First of all, they discovered the newly created Facebook page “Army of the Republic of Sandzak” (Sandzak is how they call the Raska region) with more than 7000 followers already. They asked their followers to report that page to Facebook

and it was erased in half an hour. Serbian media followed the Anonymous post, informed the public about the existence of the extremists' page and the main Persecutor for hi-tech crime ordered the police to discover the individuals behind it. Meanwhile, Serbian Anonymous already found out who those people were, and revealed their identities on their page. The police arrested them the very same day.

The event that triggered the attention of Anonymous Serbia took place on 5<sup>th</sup> September. It was the military-styled parade that stirred the public. The group of about thirty men in green uniforms with red fezzes, and green berets on their heads, occupied the central streets of the city of Novi Pazar, in Sandžak (Serbia). They marched from the HQ of the Islamist community to the main city square, in their "foray into Hadžet" (village of Novi Pazar). This parade caused mostly negative comments of prominent individuals in the city of Novi Pazar and the surrounding area because the uniforms resembled those of war criminals who took part in the extermination of Serbs during the Second World War. The parade was led by the Islamist Chief Mufti and his associates (Cyber War Zone, 2017).

### CONCLUSION

Islamic radicals and terrorist groups use the Internet in advanced and various ways to accomplish their goals. They have their IT professionals, programmers, hacker teams, and recruiters, fundraisers, etc. States and the security sector must find more efficient ways to identify the threats from the Internet, especially cyber terrorists, to track their members, intercept their communications, infiltrate them, etc. Cyber terrorism is a threat to the international community as much as any other form of terrorism. Extremists have adopted new skills to fight on a new ground – cyber ground and it will be a true challenge for the international community to fight back. Terrorists will continue to use the Internet to maintain their current methods. The question is whether or even when, they will start to utilize new, more effective ones. States, governmental, and security sectors are becoming more aware of this issue and have started creating their national cyber strategies, as well as systems of defense. But without international unified cooperation, the victory against terrorists on the Internet will not be gained.

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## **САЈБЕР БЕЗБЕДНОСТ – ВИРТУЕЛНИ ПРОСТОР КАО ПОДРУЧЈЕ СКРИВЕНИХ ТЕРОРИСТИЧКИХ АКТИВНОСТИ РАДИКАЛНИХ ИСЛАМИСТА**

**Дарко Трифуновић**

Универзитет у Београду, Факултет безбедности, Београд, Србија

### **Резиме**

Сајбер или кибернетички простор користи се и од стране носилаца терористичке претње. Већ годинама у сајбер простору одвијају се различите активности које могу да се окарактерису као сајбер тероризам. Постоји много различитих мотива за терористе да примене сајбер тероризам као метод у својој борби за наношење штете или уништавање циљева. Будући да је сајбер простор без граница, напади могу потицати са било којег места на свету и нису ограничени физичким границама. Као и сваки други облик тероризма, сајбер тероризам је потенцијално главна глобална пријетња. Терористи који су чланови разних радикалних исламских организација почели су све више да користе информационе технологије и интернет. Користе га као инструмент борбе, али и као мету напада. Ово је глобални проблем и захтева глобалну пажњу и глобални одговор. Бројни су алати и начини како терористи користе интернет за комуникацију, без страха да би их неко могао пресрести или открити. Терористи користе највећу предност сајбер простора – анонимност – и различите алате и методе како би направили стратегије и планове будућих напада, затим да би контактирали и призвали своје „спаваче”, разменили важне датотеке или још важније вршили радикализацију заинтересованих. Исламски радикали и терористичке групе користе интернет на напредне и различите начине како би постигли своје циљеве. Имају своје ИТ стручњаке, програмере, хакерске тимове и регрутере, прикупљаче средстава итд. Државе и сектор безбедности морају пронаћи ефикасније начине за препознавање претњи са интернета, посебно сајбер терориста, да би пратили своје чланове, пресретали њихове комуникације, инфилтрирали се међу њих итд.



## ФИЛОЗОФИЈА У ЗАТВОРСКИМ ЗАЈЕДНИЦАМА

Оливера Павићевић\*, Љепосава Илијић, Ивана Степановић

Институт за криминолошка и социолошка истраживања, Београд, Србија

### Апстракт

Промене у казненој политици имају, као део неолибералне управљачке парадигме, политички значај и социјалне последице унутар затворских заједница и изван њих. Затворска популација расте и поред пада или стагнације стопе криминалитета у развијеним земљама, што представља парадокс у коме се огледа стратегија политике неолибералне регулације. Она је повезана са „новом пенологијом”, која у односу на „стару” пенологију, затворску популацију посматра као статистички агрегат који повлачи одређени ризик за остваривање зацртаних управљачких учинака. Унутар затворских заједница одвија се смена из „тврде” моћи у „меку” моћ, те се у раду дискутује о идентитетским и дисциплинским ефектима тог процеса. У том смислу, приказана су искуства истраживања која су филозофију у затворима увела као начин да се оствари индивидуални идентитет раста као подстицај за повратак некадашњих идеја и пракси рехабилитације као психолошког, моралног и социјалног опоравка појединца.

**Кључне речи:** неолиберализам, управљање, затвори, филозофија, идентитет.

## PHILOSOPHY IN PRISON COMMUNITIES

### Abstract

Changes in penal policy which is a part of the neoliberal paradigm have political significance and social consequences within and outside prison communities. The prison population is growing despite the fall and stagnation of the crime rate in developed countries which creates a paradox mirrored in the politics of the neoliberal regulation. It is connected to the “new penology” which unlike the “old” penology sees the prison community as a statistical collective which entails a particular risk for the realization of the set governing goals. Since there is a shift from “hard” to “soft” power within prison communities, this paper discusses the disciplinary effects of this process. It showcases the effects of various projects which have introduced philosophy into prison environments as a way to encourage individual identity growth and inspire the return of practices of rehabilitation as a psychological, moral and social recovery of an individual.

**Key words:** neoliberalism, governance, prisons, philosophy, identity.

\* Аутор за кореспонденцију: Оливера Павићевић, Институт за криминолошка и социолошка истраживања, Грачаничка 18, 11000 Београд, Србија, [oliverapavicevic4@gmail.com](mailto:oliverapavicevic4@gmail.com)

## УВОД

Промене изазване „неолибералним пеналним таласом” (Wasquant, 2010) чине специфичан део комплексне парадигме неолибералног управљања и његове централне тржишне перспективе, која се на плану казнене политике испољила као значајно повећање затворске популације, посебно у САД и УК (Peacock, Turner & Varey, 2018). Неолиберални казнени удар и промењена затворска популација у Енглеској и Велсу удвостручили су затворску популацију у последњој деценији (85.106 затвореника), с тим да се број затвореника преко 60 година утростручио (Ministry of Justice, 2015). Треба напоменути да се ово повећање броја затвореника догодило у периоду када су стопе криминалитета биле равне или опадајуће (Prison Reform Trust, 2015). Поред законских промена које су довеле до већег броја кажњавања, дошло је и до промене ставова према одређеним врстама криминалитета. То се пре свега односи на „историјско сексуално злостављање”, огромна већина затворених особа су мушкарци, 40% су сексуални преступници (Peacock, Turner & Varey, 2018).

Постоје велике варијације у степену у којем је неолиберализам инспирисао нове визије деловања, а конкретан утицај неолибералних идеја је најочигледнији у политичкој сфери, у којој су се изменила преовлађујућа схватања о одговарајућем односу између јавног и приватног сектора (Hall & Lamont, 2013). Политике стављају нови нагласак на индивидуализацију ризика, одговорности и награде, нова јавност је изградила тржишну конкуренцију у пружању јавних услуга заснованих на праћењу, рангирању и упоређивању (тзв. бенчмаркинг) (Miller & Rose, 2008). Премда се учинци неолиберализма не могу једнострано оценити ни као монолитини, а ни као потпуно негативни, неоспорно је да је неолиберална реформа имала дубоке ретрибутивне ефекте постајући тежак изазов за одређене друштвене групе.

Неолиберална социјална реструктурирација обележена повећањем затворске заједнице, према Ваканту, није одговор на растућу несигурност повезану са криминалом, већ одговор на дифузну социјалну несигурност изазвану фрагментацијом најмног рада и уздицањем етничке хијерархије (Wasquant, 2009). Патерналистичка пенализација има за циљ да контролише и заустави урбане поремећаје изазване економском дерегулацијом и дисциплиновањем несигурне фракције постиндустријске радничке класе (Wasquant, 2010). Марљив и ратоборан „закон и ред” појављују се као исправна и отресита реакција неолиберално оцртаних политика (ширење и уздицање полиција, судова и затвора, поопштравања казних мера), како у развијеним, „првим друштвима” тако и у постранзиционом друштвима попут Србије. Проузрокујући социјалну несигурност и сходну социјалну беспомоћност, неолиберално дисциплиновање их истовремено разрешава, преведећи социјалне конфликте у криминалне прекршаје владајуће

нормативности. На тај начин омогућавају политичким елитама да поново потврде ауторитет државе, уједно надокнађујући дефицит легитимности који су давали пореци социјалне и економске заштите, како у кензијанској ери (Wacquant, 2010) тако и у социјалистичким државама. Грађански покрет владавине права у неолибералној владавини постаје „техника за управљање маргиналношћу и жива лабораторија неолиберала” у којој затвор није техничка имплементација за спровођење закона, већ кључни орган држава чији селективни и агресивни распоред у нижим регијама социјалног простора конститутивно штети идеалима демократског грађанства (Wacquant, 2010, стр. 200). Ритуално потврђивање суверенитета државе у уском, театрализованом домену спровођења закона, у чему Вакант види скривену сврху те исте државе – да призна и прикрије своју неспособност да контролише токове капитала (претежно изван граница) – у контексту српског друштва представља покушај да се појачаном пенализацијом зауздају нови и дубоки социјални конфликти настали спровођењем неолибералне социјалне агенде. Оно што им је заједничко јесте дивергенција дијагнозе која социјалну несигурност и анксиозност нижих и средњих слојева преводи у страх и несигурност изазвану нараслим криминалом. Оно што је специфично за Србију јесте удружено негативно дејство недовршене декриминализације друштва као остатка из деведестих година прошлог века, са једне стране, и неолибералне политике појачаних пеналних захтева, са друге стране. Ова два тока наглашавају важност критичке анализе „стarih” и „нових” тенденција у пеналним политикама.

Сходно тој потреби, предмет овог рада је упознавање могућности специфичних и релативно нових програма унутар затворских заједница (филозофске дискусије) и дискусија о њима, са освртом на ужи (социологија затвора) и шири друштвени контекст (неолиберална пенална политика). Сложеност интеракције која потиче од различитих извора друштвене и културне динамике која се рефлектује на затворске околности и наративе, као и немогућност да се сви аспекти (економски, политички, социјални, културни, медијски) који се тичу веза између шире друштвене и уже затворске заједнице обухвате једним радом – издвојила је циљ нашег рада. Он је оличен у покушају да се кроз дисциплину филозофије сагледају могућности унутрашње трансформације затвореника и установи да ли су ови програми део биополитичког „дисциплиновања” или могућност одмицања и критичког промишљања како у односу на сопствени идентитет тако и односу на глобални неолиберални идентитет.

## *НЕОЛИБЕРАЛНА ЗАТВОРСКА ДИСЦИПЛИНА КАО (НЕ)МОГУЋНОСТ ТРАНСФОРМАЦИЈЕ СОПСТВА*

Помак у политичком вредновању казнене политике важан је и представља само један део дубље промене у концепцији дискурса, циљева и техника казног процеса (Feeley, 1992, стр. 442). „Нова пенологија” добија менаџерски, а губи трансформативни карактер, који је био својствен „старој пенологији”. Она се не односи ни на кажњавање, а ни на рехабилитацију појединаца; није забринута ни за индивидуално понашање, па чак ни за организацију заједнице, већ је искључиво забринута за процес управљања. Циљ нове пенолошке стратегије није у томе да елиминише криминал, већ да га учини подношљивим кроз систематску координацију (Feeley, 1992, стр. 455).

Неолиберална вештина управљања заснива се на технологији сопства, која подразумева усвајање субјективитета формираног према циљевима и интересима неолиберализма (Rose & Miller, 1992; Rose, 1999). Управљање се спроводи регулацијом и контролом појединаца, која више није директна, већ почива на подстицању саморегулације, самодисциплине и самокорекције, које су усклађене са циљевима неолибералног управљања (Shore & Wright, 2011). Неолиберална агенда продире у организовање затворског живота замењујући ауторитарни надзор меком, индиректном и преговарачком регулацијом, која захтева „динамичку безбедност” и „пристојне и стабилне” режиме унутар затворских заједница (Libeling, 2004; Peacock, Turner & Varey, 2018).

Корпоративна регулација сопства у контексту затворске заједнице представља спровођење неолибералних јавних политика које имају за циљ преобликовање сопства, те затвореника и затворског особља мењајући њихове идентитете и традиционалне улоге и односе. У том смислу, треба имати у виду да је неолиберални пројекат изменио природу односа у затворским заједницама и, као најважније, изменио природу моћи и дисциплинског дискурса. „Реконструкцију моћи” у затворима прати прелазак из „тврде” моћи у „меку” моћ (Crewe, 2009). Затворски службеници су, у све мањој мери, супротстављени затвореницима заузимањем „непријатељске” позиције, која се манифестује „тврдом моћи” (агресија и антагонизам), они постају носиоци „меке моћи”, која функционише са дистанце (Crewe, 2009). Психолошка надмоћ затворског особља потиче од могућности доношења одлука о питањима важним за затворенике (тестирање на дрогу, извештаји који утичу на категоризацију и превремено пуштање на слободу). Мека моћ је без лица и не захтева директну интервенцију особља, а великим делом је заснована на успостављању саморегулације или самодисциплиновања затвореника као нове компоненте затвореничког сопства. Мањак присиле не чини је мање чврстом и ефикасном. Ова „мека сила” кључна је компонента „неопатернализ-

ма”, који карактерише затворски систем Енглеске и Велса, то је сфера моћи која чини непотребном употребу директне команде или принуде или јој претходи (Crewе, 2009). Преобликовање затвореничког сопства кроз аспекте третмана и регулације остварује се кроз директне односе између особља и затвореника и индиректно кроз политике које подстичу затворенике да регулишу своје понашање, премештајући одговорност за управљање својим понашањем на затворенике који се окрећу позитивном укључивању у режим (Peacock, Turner & Varey, 2018). Ове политике, неолибералне по свом карактеру (Garland, 1997), као елемент „владавине” (Dean, 2006; Rose, 1999) обезбеђују затвореницима псеудоанонимни простор, истовремено их оспособљавајући да користе ову аутономију на посебне начине, награђујући их за то. Затвореници се у складу са корпоративним менаџментом „динамичке стабилности” подстичу на интеракцију са особљем мотивисану инструменталним разлозима (Crewе, 2009). Добар однос са затворским службеником може довести до значајних разлика у смислу добијања мањих услуга, привилегија и позитивних извештаја. Односи су тако мотивисани извештаченошћу личних интереса и експедитивношћу, исто колико и истинским ангажовањем (*Ibid.*). Динамика доминације почива на ненормативним мотивима одвијајући се у игри моћи различитој у односу на ону која карактерише традиционалну затворску културу.

Кад се затвореници према овој мекој сили не регулишу на одговарајући начин, ауторитарно лице затвора открива се кроз наредбе, контроле и казне о којима затвореници немају простор за преговарање (Crewе, 2009). Унутар затворске заједнице, од затвореника се очекује да покажу преданост и да се мењају кроз активни ангажман у складу са институционалним циљевима, што не подразумева само пасивно кретање кроз систем, избегавање невоља и поштовање правила, већ и разумевање нејасних критеријума у процени ризика које спроводе затворски службеници (Liebling et al., 1999; Liebling & Price, 2001; Attrill & Liell, 2007). Шема заслужених привилегија подстиче затворенике да управљају детаљима свакодневног понашања, које је прилагођено мекој моћи дисциплинских политика, које се по свом домету и својим циљевима разликују од ауторитарнијих стратегија. Оне теже да остваре шири и чвршћи надзор над понашањем и спознајом превазилазећи основне захтеве осигуравања реда и послушности.

„Ауторитарна рехабилитација” (Rotman, 1990), која се остварује унутар меке дисциплине, има значајне последице на пољу слободе, легитимитета и аутономије, јер се ради о институционалној стандардизацији и шематизацији појединачних судбина. Иако организацијски нагласак на међуљудској пристојности и стабилности режима између особља и затвореника, као и смањена ауторитарност,

барем на површини, даје позитивне ефекте, инструментализација односа између затвореника и особља доводи до њихове извештачености, неаутентичности и неискрености (Serwe, 2009). Неолиберална пракса моћи и дисциплиновања оличена у афективном менаџменту и корпоративном људском делању заснованом на прорачуну и балансу између савеза, ризика и одговорности (Gershon, 2011) продире у појединачне друштвене сегменте и праксе живота који истовремено представљају могућа места измицања таквом поретку.

### *ИЗМЕЂУ КРИМИНАЛНОГ И КОНВЕНЦИОНАЛНОГ ИДЕНТИТЕТА*

Сложеност проблема људског идентитета ћемо у сврху наше анализе сузити на питања која се баве идентитетом у специфичном контексту затворске заједнице. Питање сопства и филозофске дилеме шта значи бити човек, у тој ситуацији, подразумевају околности лишавања слободе. Међутим, једно од основних питања које се односи на идентитет личности која је починила криминал тиче се мотивације учиниоца да почне да размишља о идентитету и животу без криминала. Различите криминолошке теорије, а посебно теорије о одустајању (*desistence*), разматрају идентитетске трансформације као пут у некриминалну будућност учиниоца. Постоје различити одговори који се односе на различите димензије сложеног конструкта идентитета и сопства, као што су вредности, циљеви, хумано деловање и осећање себе. Они су у корелацији са структуралним карактеристикама ширег окружења, али и ужег окружења унутар саме затворске заједнице. Криминални идентитет не чини свеобухватно сопство учиниоца, већ се појављује као један од понуђених идентитета који може бити привремен и смењивати се другим идентитетским димензијама сопства учиниоца. Сваки од тих идентитета „вреднује одређене линије деловања” и мотивише понашање у различитим ситуацијама (Burke & Reitzes, 1991). Рефлексивно и интерпретативно сопство није одређено фиксираним и једноструким идентитетом, већ је динамично, рефлексивно и спремно за промену. Већина људи има вишеструке погледе на себе, а ти вишеструки идентитети организовани су у хијерархију истакнутости (Sryker & Burke, 2000). Осећање сопства у садашњости може бити сплет више централних или суштинских аспеката сопства који су „хронично доступни”, а присуп компоненти самосознаје укључује како разумевање себе у садашњости тако и усмереност ка сопству у будућности. „Могуће сопство” може се сагледати као позитивно (жељено) и као негативно (нежељено) (Markus & Nurius, 1985 према Paternoster & Bushway, 2009, стр. 1113). Могућа сопства су концепти сопства пројектовани у будућности и састоје се од циљева и тежњи, страхова и зебњи. Они нису



пука фантазија, већ су повезани са садашњим ја, као и прошлим искуствима, која у великој мери могу бити одређена затворским искуством. Унапређивање осећања сопства веома је важно у околностима вишеструких лишавања какво представља затворска казна, а усмеравање ка могућем позитивном стању сопства представља сложен задатак који је поверен различитим затворским третманима (образовање, психотерапија, рад и др.). Криминолошка литература, посебно новија литература о одустајању (енгл. *desistance*) – говори о пожељној промени идентитета, која се креће од идентитета преживљавања ка идентитету раста (Liebling & Arnold, 2004; Haigh et al., 2012; Liebling, 2012; Szifris, 2017). Фундаментално и интенционално померање у осећању личности (Maruna, 2001) оличене у трансформацији идентитета различито су сагледане са становишта друштвених веза и конвенционалних улога, које према једном приступу представљају услов промене (утицај породице, запошљавања, затвора, третмана) (Giordano et al., 2002), док према другом теоријском приступу, промена идентитета претходи социо-структурним променама (промена је изазвана предвиђањем застрашујуће будућности у случају наставка криминалног начина живота) (Paternoster & Bushway, 2009). Интенционална промена сопства пресудна је за одустајање од криминала, она потиче од првобитне одлуке учиниоца да се промене мењајући осећање себе, мотивисани „застрашујућим сопством” – оним што особа не жели да постане и тежњом ка промени „исквареног сопства” (Paternoster & Bushway, 2009). Нада у будућност усмерена је ка реализацији „идеалног сопства”, које је у раскораку са доживљајем „стварног сопства” (Higgins, 1987). Међутим, постоје докази да се може одустати од криминала и без интернализације конвенционалног идентитета (Nugent & Schinkel, 2016), као и да учиниоци могу наставити са криминалним деловањем упркос позитивном, просоцијалном идентитету и конформистичким вредностима (Liem & Richardson, 2014). Оно што фундаментално разликује оне који одустану од криминала од оних који упорно опстају у њему – може бити повезано са њиховом способношћу да буду посвећени одустајању, да иду право ка њему са осећањем за људско делање (Burnett, 2013; Liem & Richardson, 2014).

Основна и свеобухватна теза истраживања могућности трансформације идентитета у затворима почива на претпоставци да онеспособљавајуће окружење у затворским заједницама промовише идентитет преживљавања (хипермушкост мачо-поткултуре), док подстицајно окружење промовише идентитет раста (Liebling, 2012; Szifris, 2017). Ова теза признаје улогу особе као дејственика у формирању и развијању сопственог идентитета уз признавање прилике за саморазумевање, које се сматра важном компонентом личног развоја. Међутим, неолиберална перспектива, такође, користи друштвене односе и стратегије у формирању идентитета и захтева деловање као реф-

лексивни став и сопство као пројекат који се свесно ствара преко различитих могућих савеза и препрека (Gershon, 2011). Појединци су рефлексивни менаџери својих способности и савеза, они управљају собом преузимајући скуп вештина или особина које су по природи фрагментарне, флексибилне и прилагодљиве. Фрагментарно и не-есенцијално својство идентитетског језгра (персоналности) у Гофмановој многострукости сопства које потиче од вишеструких и кратко-трајних улога које се одвијају у континууму социјалних интеракција и променљивих контекста (Goffman, 1969; Collins, 1988) – разликује се од рефлексивног аспекта неолибералног бића које постоји пре партикуларног релационог контекста и које одлучује како ће се појединац повезати са другим људима, институцијама и контекстима (Gershon, 2011). Неолиберално сопство је претходеће, аутономно и друштвено конструисано, оно нуди неједнако партнерство као скуп рефлексивних вештина које субјект развија ступајући у друштвене односе као тржишне савезе (при чему се добровољно одриче одређених аспеката своје аутономије). У том смислу, трансформација сопства као скупа употребљивих вештина и остваривање партнерства у неједнаким позицијама, какво постоји у затворским заједницама у неолиберално-корпоративном духу, није пут ка остваривању идентитета раста, већ искључиво развијање капацитета за преживљавање у контексту неолибералне рационалности.

Подстицајно окружење које омогућава идентитет раста у условима дуготрајног затвора тражи прилику и начине за саморазумевање кроз идентитетски преображај који подразумева више од „способности за самопомоћ” (Brown, 2006, стр. 694) или друге облике неолибералног субјективитета, који је способан да преживи у околностима ризика. Идентитет преживљавања у затворској заједници, у том смислу, повезујемо како са традиционалним концептима хипермушкости тако и са неолибералним рефлексивним самоменаџментом. Насупрот њима, пожељни процес помена идентитетских формација (Shapland et al., 2016) повезан је са идентитетом раста, који је од фундаменталног значаја за одустајање од криминала и сходну промену вредносне самоперцепције важну за живот након издржавања затворске казне. Реч је могућности развоја просоцијалног, позитивног идентитета, који карактерише лични раст и развој заснован на елементима међусобних односа, поверења, добробити и отворености (Szifris, 2017). У том смислу, сложеност конструкта идентитета можемо посматрати кроз два концепта, а то је концепт самопомоћи, који би био показатељ преживљавања, и концепт саморазумевања и саморазвоја, који би био показатељ личног раста и развоја.

Имајући ову разлику у виду, прихватамо закључке истраживања која су показала да однос између жеље за конвенционалним и нормалним животом није пресудна у разликовању преступничког иденти-

тета од оног који то није (Bottoms & Shapland, 2011; Burnett, 1992; Farrall, 2002; Doekhie & Van Ginneken, 2019). Ова истраживања показала су да не постоји никаква повезаност између конвенционалних аспирација и криминалног понашања јер и они који одустају и они који настављају са криминалним понашањем изражавају конвенционалне циљеве и у затвору и након пуштања из затвора; конвенционалне тежње које изражавају затвореници често су површне и често су ослоњене на конвенционалне успехе (Farrall, 2002); многи учесници истраживања – и они који су одустали и они који су настављали са криминалним понашањем – нису имали конвенционалне узоре, нити могућности за изградњу конвенционалног идентитета услед недостака друштвеног капитала и могућности за остваривање конвенционалних улога; конвенционалне тежње и криминални животни стил нису међусобно искључиви. Упорни преступници су често били посвећени коришћењу криминалних путева како би постигли и испунили уобичајене улоге (Doekhie & Van Ginneken, 2019).

Овим налазима оспорене су теорије које сугеришу да улога идентитета и когнитивне трансформације у процесу одустајања значи прихватање конвенционалних аспирација јер оне нису довољне, саме по себи, да обухвате ову промену. Недостатак „доступних скрипата” о томе шта представља спровођење „добре” просоцијалне улоге представљао је један од пресудних проблема у трансформацији идентитета, који упућује на то да конвенционалне тежње морају бити испуњене садржајем који ће бити повезан са истинским разумевањем њиховог значаја за будући идентитет учиниоца, чак и у мање конвенционалним околностима. Налази студије оспоравају неке идеје постојећих теорија одустајања које праве разлику између криминалног и конвенционалног идентитета (Giordano et al., 2002; Maruna, 2001) јер упорни преступници прихватају облик криминалног бића које коегзистира заједно са другим некриминалним идентитетима илуструјући замршену амбиваленцију конвенционалних тежњи и криминалних активности (Doekhie & Van Ginneken, 2019). Самојачање као развијање позитивне компоненте могућег сопства које подстиче оптимизам и пружа наду спрам боље будућности може ићи и у супротном правцу, тако што ће самојачање оснажити мрачну и негативну компоненту сопства („мрачни отпор” Ниче, 1994) и стварати слику будућности са снажним осећањем безнадежности. Каква ће бити „мапа пута” зависи од саморегулације сопства (између садашњег и могућег) (Paternoster & Bushway, 2009), али и самоспознаје и самопромене које ће потиснути страх од себе и за себе, а оцртати оствариво позитивно сопство у будућности.

Када је реч о питању шта је то што затворенику може отворити нове путање, обрасце, циљеве и средства у процесу трансформације сопства ка позитивној промени, нагласак је на разлици између

идентитета преживљавања и идентитета личног раста. Могућности за саморазвој затвореника повезане су са мером у којој је предвиђено да затвореници проводе време сврсисходно, на конструктиван начин како би развили своје потенцијале, стекли осећај за правац и припремили се за отпуштање (Liebling & Arnold, 2004). Истински лични развој укључује личну трансформацију у којој се у основи мења самоперцепција и будућа имагинација сопства. Затвор и његова морална устројства (формална и неформална) чине елемент квалитета живота у затвору, који је од изузетног значаја за разумевање ефеката затворског живота на доживљај, конструисање и реконструисање будућег сопства учиниоца. Окружење које омогућава смену идентитета опстанка идентитетом личног раста може се описати као окружење које подстиче самопосматрање, самотумачење, успостављање поверења, обезбеђивање простора за позитивну и просоцијалну интеракцију и развијање интелектуалне климе филозофског истраживања (Szifris, 2017). Филозофија, као предмет и дисциплина, добија нови значај и релевантност за учеснике групних дијалога у којима се развија осећање емпатије и (делимичног) заједништва, као додатна, али важна и различита, супкомпонента терапеутског рада у затворима.

### *ЗНАЧАЈ ФИЛОЗОФИЈЕ И КРИТИЧКОГ МИШЉЕЊА ИЗВАН ЗАТВОРСКЕ ЗАЈЕДНИЦЕ И УНУТАР ЊЕ*

Према традицији либерализма, образовање је схваћено као нешто што ослобађа човека. Оно је само по себи повезано са концептом аутономије јер омогућава човеку да усмери, то јест одреди, сопствени живот (Winch & Gingell, 2008, стр. 18). Међутим, није реч о било каквом образовању и, уопште, било каквом знању. Управо критичко мишљење испуњава тај циљ образовања, односно припрема човека за аутономију (Winch, 2006). Као мишљење које се критички односи према свакој претпоставци и свакој датости, оно није условљено и ограничено некаквим задатим оквирима. Оно преиспитује чак и задате оквире размишљања.

Последњих година постоји глобална тенденција да се педагогија трансформише тако да се критичко мишљење уведе у све образовне дисциплине (Thomas, 2010). Заговорници „критичке педагогије” тврде да критичко мишљење омогућава слободу и увећава капацитет људских способности, а то чини, на пример, тако што расветљава неједнаке односе моћи у друштву и на тај начин пружа методе за отпор против његових репресивних сила (Popkewitz & Flender, 1999). Критичко мишљење преиспитује и критикује односе моћи отварајући нове перспективе. Ако се пође управо од овог становишта, онда је јасно на који начин критичко мишљење може бити корисно за затворску заједницу. Развијање критичког мишљења требало

би да омогући појединцима да пронађу квалитетније стратегије идентитетске трансформације у затвору већ самим тим што може да омогући другачији поглед на односе моћи у том окружењу. Критички однос према тим односима моћи ослобађа појединца тако што му омогућава да се измести и своју ситуацију као стање неслободе сагледа са стране. Такође, критичко мишљење може да утиче на „психолошко благостање” затвореника, охрабри „саморефлексију” или развије нове интересе и способности (Szifris, 2018).

Међутим, како уопште треба разумети овај концепт критичког мишљења? Критичко мишљење често се дефинише као једна врста способности (енгл. *skill*) да се размишља разумски, односно да се чињенице прихватају критички, а не да се оне једноставно усвајају без икаквог преиспитивања. Та дефиниција полази од претпоставке да људи обично не анализирају претпоставке, своје свакодневне обавезе и логику свакодневице, а такође и не постављају питања о разлозима или смислености својих живота (Popkewitz & Flender, 1999). Смисао критичког мишљења је дакле некаква способност да се користе логични аргументи, да се чињенице проверавају, да се препознају неистините тврдње и неосноване генерализације, као и да се означе непоуздани ауторитети и нејасни концепти (*Ibid.*).

Ипак, може се расправљати о томе да ли, историјски, идеја критичког мишљења потиче из филозофије античке Грчке (Fisher, 2011), премда се сâм концепт везује са модерну филозофију. Наиме, сâм постанак филозофије у античкој Грчкој јесте један дисконтинуитет, велики преокрет са мита на логос, који се дешава управо кроз упитност, постављање проблема и покретање расправа о питањима о којима се до тада није расправљано и вођење дијалога уз коришћење логичних аргумената (Vernan, 1990, стр. 101). У том смислу, критичко мишљење је постављање питања о стварима које су иначе прихваћене као датости и расправљање о појавама које се иначе не доводе у питање. Филозофске мисли предсократоваца, а касније Сократове беседе и дијалози које је забележио Платон – представљају рађање управо те традиције критичког размишљања којој је много касније дат овај назив. Наиме, тек је Џон Дјуи увео и користио концепт „рефлексивно размишљење” да објасни облик размишљања који пажљиво анализира веровања и знања улазећи у њихове темеље и водећи рачуна о последицама које из њих следе (Dewey, 1909, према Fisher, 2011, стр. 2). Потом Едвард Гласер појам *рефлексивно размишљање* замењује појмом *критичко мишљење* и каже да оно представља напор да се веровања и знања преиспитају у светлу доказа који их подржавају, као и последица које из њих следе (Glaser, 1941, према Fisher, 2011, стр. 3).

Управо многе дефиниције саме филозофије полазе од идеје која је накнадно уобличена у концепт критичког мишљења. Теодор

Адорно, на пример, каже да је филозофија обавезна да немилосрдно критикује сама себе и назива је „критичка саморефлексија” (Adorno, 2004, стр. 3–4). Финк тврди да се филозофија састоји у „негирању задатих и стављених нам на располагање могућих начина мишљења” и у „обрани од предоциби које се намећу из природног односа човијека спрам свијета” (Fink, 1998, стр. 15). Финк такође каже да филозофија настаје у „негирању непосредности људског понашања према бићу, тиме што управо ту непосредност као такву доводи у питање” (Ibid. стр. 16). Филозофија, дакле, доводи у питање све што је непосредно дато, односно одлази иза датости и одводи мисао на спекулативни ниво. Француски филозоф Жил Делез рекао би да је филозофија креативна дисциплина која ствара појмове, јер појмови који објашњавају ствари или појаве увек морају да буду нови (Deleuze, 1994). Другим речима, уместо да користи већ дате појмове који имају учвршћена значења, филозофија их узима, преиспитује и изнова ствара, то јест, оживљава и трансформише или измишља потпуно нове концепте како би нешто ново рекла о нечему. У том смислу, рећи ће Делез, филозофија заправо није пука контемплација, рефлексивна или комуникација, већ она ствара појмове који су потребни за ове акције (Ibid. стр. 6).

Како онда треба схватити корист од филозофије уопште или, конкретно, у контексту затворских заједница? Каква је иначе корист од филозофије? Финк, на пример, каже да „филозофија не користи баш ништа” јер она човека чак „удаљава од важности свакидашњице у којој се налазе његове дужности, патње и радости, ремети га у сигурности његова опхођења са стварима свијета, баца га у бездан упитности и, дође ли до тога, прибавља му знање с којим не може ништа започети” (Fink, 1998, стр. 18). Међутим, управо та бескорисност филозофије која долази од њене метапозиције – иза стварности, чини се, може имати некакву корист. На пример, истраживања Кристине Сифриз,<sup>1</sup> која је у затворима у Великој Британији организовала филозофске дебате са затвореницима, показала су управо то. Само практиковање филозофског мишљења представља заправо некакав алат помоћу којег се нешто ипак може започети, и то управо у средини каква је затворска.

Ово истраживање Кристине Сифриз упућује на то да постоји извесна практична корист од примене филозофије или самог „филозофирања”. Она се састоји у томе што отворена дискусија о „неутралним” и апстрактним темама има способност да охрабри „позитивну интеракцију” међу осуђеницима у затворима, али и њихову

<sup>1</sup> The Conversation, Teaching Philosophy to Prisoners can Help Transform Macho Prison Culture <https://theconversation.com/teaching-philosophy-to-prisoners-can-help-transform-macho-prison-culture-91023>, 1. 5. 2019.

смиреност и спремност да реагују без агресије тиме што ће допринети разумевању, слагању и осетљивости за прихватање другачијих перспектива (Ibid.). Ова ауторка се са правом пита да ли би практиковање филозофије кроз радионице и едукативне програме заправо могло да „трансформише” читаву затворску културу и редукује насилије. Ако ништа друго, њено искуство показало је да само учествовање у оваквим активностима чини да се осуђеници осећају слободније унутар затвора, који је сâм по себи место лишавања слободе јер припадају елитном кругу у оквиру затворске заједнице и могу слободно да расправљају о питањима друштва, друштвеног уређења, морала и слично. Ту је, дакле, реч о стварању метафизичких зона слободе у оквиру физичких простора чија је намена управо лишавање појединаца њихове слободе заједно са свим осталим људским правима.

Ипак, да ли је већ само то питање о трансформативној и оснажујућој моћи филозофије и образовања уопште део неолибералистичке парадигме о одговорном субјекту који сâм себе изграђује и сâм себи помаже? Наиме, неолиберални субјект схваћен је као предузетник (Rose, 1999), који се развија и адаптира (Buchowski, 2001), али и развија отпор према системима моћи, способан да трансформише не само себе већ и систем (Chandler & Reid, 2016). Када Кристина Сифриз говори о саморазвоју кроз рефлексивне праксе, односно када каже да филозофија доприноси развоју појединца кроз истраживање комплексних и апстрактних тема (Szifris, 2018), она можда говори унутар овог дискурса неолиберализма. Међутим, пошто филозофија као критичко мишљење може да доведе у питање све задате оквире размишљања, она омогућава чак и да се изађе из тог неолибералистичког оквира. Овај начин размишљања омогућава појединцу да се мисли из друге перспективе, односно, изван неолибералистичке идеологије. Самим тим што филозофија доводи у питање постојеће концепте и тачке гледишта, она може критички да се односи према било чему, па и према неолиберализму, који се чини као неизбежан јер представља као некакав „доминантни стил живота” (Couldry, 2010) или чак „етику” (Harvey, 2005), која прожима све аспекте друштва.

Чак и ако се занемари читава идеја „трансформације” затворске културе и замисао о филозофији као некаквој врсти самопомоћи (енгл. *self-help*) као дериват самог неолиберализма као идеологије, може се рећи да сама дефиниција филозофије као једног рефлексивног пројекта упућује на то да она обезбеђује одређени вид слободе. Наиме, она може субјекта да изведе из позиције неолибералног управљаног (енгл. *governed*) субјекта управо кроз процес преиспитивања постојећих односа моћи. У том смислу, затвореници који имају шансу да практикују филозофију, односно, критичко мишљење, такође добијају могућност да освајају нове слободне територије унутар неслободних простора, критикују сâм систем, његове етичке кодексе

и механизме, па на крају чак и да промене или унапреде функционисање самих затвора. Практиковање филозофије у затворима, дакле, може бити вид пружања отпора који уместо физичке силе користи силу критичког размишљања и логичне аргументације.

### ЗАКЉУЧАК

Промене изазване *неолибералним пеналним таласом* чине специфичан део комплексне парадигме неолибералног управљања и његове централне тржишне перспективе, која се на плану казнене политике испољила као значајно повећање затворске популације и поред релативно стабилне стопе криминала. Неолиберални конструкт је у сфери казнене политике померио и тежиште интересовања ка индивидуализацији и процени ризичних категорија осуђеника, одговорности и награде, при чему је „нова пенологија” дотадашња усмерења ка ресоцијализацији и поправљању учиниоца заменила мерљивим концептом корпоративног менаџерског управљања (затворским системом, ризичним групама осуђеника и сл.). Корпоративна регулација сопства у контексту затворске заједнице представља спровођење неолибералних јавних политика које имају за циљ преобликовање сопства, затвореника и затворског особља, мењајући њихове идентитете и традиционалне улоге и односе. У том смислу, изменио је природу моћи и дисциплински дискурс из „тврде” моћи непријатељске позиције затворских службеника у „меку” моћ психолошке надмоћи, која функционише са дистанце. Практиковање филозофије у затворским заједницама по узору на модел који су неке западне земље већ примениле могао би се и у Србији показати као конструктиван метод оснаживања осуђеника и њиховог оспособљавања за функционисање у заједници.

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## PHILOSOPHY IN PRISON COMMUNITIES

**Olivera Pavićević, Ljeposava Ilijić, Ivana Stepanović**

Institute of Criminological and Sociological Research, Belgrade, Serbia

### Summary

A prison sentence as a form of punishment in the sense of a specific (political) response leads us to the question of the importance and purpose of rehabilitation. Rehabilitation appears as an antithesis to the prison sentence so that even when the goals of penal policy in the neoliberal governmentality practices are altered in the way we have shown in this paper, there is a demand not to give up on the idea of rehabilitation.

The neoliberal social restructuring has been marked by the increase of the prison population and it isn't a response to the rising insecurity related to crime, but a response to the diffused social insecurity caused by the fragmentation of wage work and glorification of ethnic hierarchy. The goal of the paternalistic penalisation is to control and stop the urban disorders caused by economic deregulation and disciplining the insecure fraction of the post-industrial work class. Hard-working and militant 'law and order' appear like the righteous and vigorous reaction of the neoliberal policies (expansion and the glorification of the police, court and prison, as well as tightening of the prison measures) in both the developed 'first world' countries and post-transitional societies such as Serbia. By producing social insecurity and social helplessness, the neoliberal disciplining is at the same time resolving them while transforming social conflicts into criminal offences. In this way, they are enabling political elites to reconfirm the authority of the state while compensating the deficit of legitimacy acquired by social and economic protection of the Keynesian era, and in the socialist states (Wacquant, 2010). The citizens' movement of the rule of law under the neoliberal governance is becoming a technique for governing the marginal and the living laboratory of the neoliberals within which the prison is not a technical implementation of laws, but a key organ of states whose selective and aggressive layout in the lower regions of social space is constitutively damaging the ideals of democracy (Wacquant, 2010, p. 200). Ritual confirmation of sovereignty of a state in a narrow theatrical domain of law implementation within which Wacquant sees a hidden purpose of the same state, which is to admit and cover up its inability to control capital flows (mostly beyond borders), becomes an attempt to restrain new and deep social conflicts caused by the neoliberal social agenda in the context of the Serbian society. The divergence of the diagnosis which translates social insecurity and anxiousness of the middle classes into fear and social insecurity caused by the rise of crime is what both of them have in common. In the context of Serbia, there are negative consequences of the unfinished decriminalisation of the society which is the heritage from the 1990s, on the one hand, and the neoliberal vision of the strengthened penal requests on the other. These two streams accentuate the importance of the critical analysis of the 'old' and 'new' tendencies in penal politics.

Considering this specific need, this paper focuses on the discussion about the possibilities of specific new programs within prison communities (philosophical discussions) with a reference to the narrower (sociology of prisons) and wider social context (neoliberal penal policy). The complexity of the interaction stems from different sources of the social and cultural dynamics, which is reflected in prison circumstances and narratives. It is impossible to comprehend all the economic, political, social, cultural and

media aspects of the ties between wider social and narrower prison community. This paper is an attempt to view the possibilities of the internal transformation of prisoners through the discipline of philosophy and investigate whether these programs are a part of the biopolitical 'disciplining' or a possibility of distancing from the prison community through a critical analysis of one's own identity and the global neoliberal identity.

## STRATEGIC COMMUNICATION AND SOCIAL NETWORK INFLUENCE: THE METHODS OF PSYCHOLOGICAL MANIPULATIONS IN CYBERSPACE AND THE SUGGESTION FOR ITS PREVENTION

Miroslav Mitrović<sup>1\*</sup>, Dragan Vasiljević<sup>2</sup>

<sup>1</sup>Strategic Research Institute, University of Defence in Belgrade, Serbia

<sup>2</sup>Serbian Armed Forces, Serbia

### Abstract

Strategic communication is one of the expressions of state power and the instrument for achieving political and the security of national interests. In the context of contemporary conflicts, it is an appearance of hybrid action in the fields of information, the media, the Internet and the wide spectrum of public diplomacy performances. The main goal of strategic communication (SC) is to influence public opinion. In addition, SC strives to move the focus of the public towards cultural values as well as the adjustment of the political system. The main task of strategic communication (SC) is to influence public opinion and its focus on cultural values, the possible adaptation of the political system by "reprogramming" political culture in accordance with the goals set by psychological influence. One of the main channels for influence are social networks. In the paper, we used a multi-criterion analysis to identify the method of prevention pertaining to psychological manipulations in the cyberspace. This paper suggests preventive measures against negative impacts of social networks. In the paper, we used the Analytic Hierarchical Processes for the analysis of hierarchy in the application of preventive measures. Based on the obtained results, we developed and presented the application of preventive measures, to prevent the harmful effects of psychological manipulations in the cyberspace.

**Key words:** strategic communication, hybrid warfare, Internet social networks, psychological manipulation, cyberspace.

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\* Аутор за кореспонденцију: Мирослав Митровић, Институт за стратегијска истраживања, Универзитет одбране Београд, Незнаног јунака 38, 11000 Београд, Србија, mitrovicmm@gmail.com

## СТРАТЕШКА КОМУНИКАЦИЈА И УТИЦАЈ ДРУШТВЕНИХ МРЕЖА: МЕТОДЕ ПСИХОЛОШКИХ МАНИПУЛАЦИЈА У САЈБЕР ПРОСТОРУ И ПРЕДЛОГ ЊИХОВОГ СПРЕЧАВАЊА

### Апстракт

Стратешка комуникација је један од израза државне моћи и представља инструмент у политичком и безбедносном остваривању националних интереса. У контексту савремених сукоба, представља израз хибридног деловања у областима информисања, медија, интернета и широког спектра деловања јавне дипломатије. Главни задатак стратешке комуникације (СК) јесте утицај на јавно мњење и њено усредсређивање на културне вредности, могућем прилагођавању политичког система „репрограмирањем” политичке културе у складу са постављеним циљевима психолошког утицаја. Један од главних канала за утицај је интернет, конкретније, друштвене мреже и активности у сајбер простору. У раду је коришћена мултикритеријумска анализа са циљем идентификације метода превенције од психолошких манипулација у сајбер простору. Поред тога, овај рад предлаже превентивне мере против негативних утицаја на друштвеним мрежама, како на појединца тако и на друштвену заједницу. У раду су помоћу аналитичких хијерархијских процеса извршене анализе приоритета у примени превентивних мера. На основу добијених резултата, развили смо и представили превентивне мере, у циљу спречавања штетних ефеката психолошких манипулација у сајбер простору.

**Кључне речи:** стратешка комуникација, хибридно ратовање, друштвене мреже на интернету, психолошке манипулације, сајбер простор.

### INTRODUCTION

In contemporary society, Strategic communication (SC) is a part of social activities in the phase of strong development and growth, based on effective and accurate usage of information. However, not all communication is strategic, nor is all strategic communication conducted against positive goals (Holtzhausen & Zerfass, 2015, p. 3-17). The existing understanding of SC is mostly based on the definition suggested by Hallahan as “communicating purposefully to advance (the organization’s) mission” and “implies that people will be engaged in deliberate communication practice on behalf of organizations, causes, and social movements” (Hallahan, et al. 2007, p. 4). Also, SC is a modern management concept of permanent adjustment of multidisciplinary interactive communication between different levels and forms of entities, with a goal to achieve the desired relationships between subjects in the process (Mitrović, 2017). In the sense of understanding of SC as a tool for presenting the organization as a social actor in creating a public culture (Mitrović, 2019a), strategic communication could be observed through:

- National (state) institutional level: public diplomacy, psychological operations, public affairs, propaganda, interest communication (lobbying, representation of interests, strategic negotiation) (Mitrović, 2019b).

- Corporate level: public relations, integrated marketing communication, socially responsible practices, corporate political activities (Mitrović, 2019c).

At the national level, to be successful, strategic communication must include the communication content and broadcast of activities, "images" and politics (Christopher, 2011a, p. 5) which will inform, influence or convince the audience in the nature of the message of national objectives (Christopher, 2011b, p. 4).

### *CYBERSPACE AS AN INFLUENTIAL SPACE FOR SC PERTAINING TO DEFENSE ISSUES*

Besides the fact that cyberspace has no overall, unique definition, contemporary research and works indicate that cyberspace is an environment in which, a cognitive world is created by intellectual activities through the interface of information and communication systems. (Vasiljević, Vasiljević & Djurić, 2018, p. 225).

Developed technical solutions, which are the base for the implementation of channels for communication, make actual societies dependable on informational and communicational technologies. Moreover, contemporary civilization is linked with digitalized communication, which makes all national (state) systems potentially fragile and vulnerable to all sorts of attacks in cyberspace (Mitrović & Miljković, 2018).

The indicated characteristics of cyberspace are core for information operations whose goal is to influence attitudes and the public opinion and thinking. Effects are influential on the motivation for defense, the trust in political and army leadership, but also aspects of mobilization and recruitment. Influence on personality in cyberspace can affect the predictable behavior through personality change attitudes, depending on their basic psychological characteristics. The influence on the predictable behavior of the personality is the goal of contemporary psychological operations performed in cyberspace, which are referred to as "impact operations".

In the contemporary information age, the application of information technology in contemporary psychological operations is widespread and almost unavoidable. The Internet, as the prevailing part of cyberspace, is used as the main medium for the distribution of psychological content. The specialized software tools are used to analyze the target group with purpose of a more accurately and efficiently distribution of the psychological content. Therefore, the material of psychological "impact operations" must be particularly attractive for the target group. More precisely, a message must be adapted to the psychological characteristics of the target audience.

The personality characteristics determine the behavior on the Internet and this is the basis for the selection of target groups of psychological operations in cyberspace. Therefore, one of the models of psychological operations implies influencing the predictable behavior of a person through the change of beliefs and attitudes, depending on their psychological characteristics and ways of behavior in cyberspace. Concerning Hansen (Hansen, 2013), influence on the attitudes and behaviors could be exposed in the following ways: 1) critical resources controlling, 2) fraud and 3) social influence. Pratkanis (Pratkanis, 2007) defines social influence as any non-coercive technique, procedure or manipulation that relies on the socio-psychological nature of human beings as a means of creating or changing the belief or behavior of the goal.

The societal influence on the predictable behavior of a person through the change of beliefs and attitudes can significantly emerge in the cyberspace. Due to the low cost of access, the wide variety of users, the global distribution and the high speed of information flow, social networks have a major impact on the behavior of their users.

The activities of individuals or organizations consciously focused on the attempts to change attitudes and behaviors of individuals, a smaller or larger group of people, are called an "operation of influence". The goal of operation of influence is to achieve an impact on the target group audience, which consequently implies the power position of a side which leads the operation. One way of influencing toward a change of attitudes and forming the opinion of the target group, which is applied in the operations of influence, is the dissemination of information and data, messaging and knowledge exchange (Gupta & Dhami, 2015).

Research on the relationship between the cyberspace and social psychology suggest that cyberspace offers numerous possibilities for "knowledge sharing" and "coercive operations designed to influence the target group change, compromising, destruction or theft of information access to information systems and networks" (Pissanidis, Rõigas & Veenendaal, 2016). Research conducted by Deng and Liu (Deng & Liu, 2017) approved the existence of a relationship between personality traits and behavior on social networks based on the theory of the "Big Five". The Big Five theory considers *openness*, *conscientiousness*, *extraversion*, *agreeableness*, and *neuroticism* as main personality traits (Power & Pluess, 2015). Closely, in the scope of the psychological influence on personal cognition in cyberspace, Kosinski (Kosinski, et al. 2014) suggests that there are significant psychological links between the users' personalities, and their profile at the most famous social network, Facebook. The behavior of users in cyberspace is a cyber-personality (Sartonen, Huhtinen & Rhizomatic, 2016), the "digital image" of a real personality. It offers opportunities for precise impact operations that can be directed to a target group.



The theory of planned behavior (TPB) explains that attitudes play an important role in explaining human behavior and that they are formed from prominent beliefs about this behavior (Ajzen, 1985). The TPB suggests that the impact on behavior (and its change) can be made through changes in attitudes, subjective norms, and the perceived behavioral control. According to Ajzen (Ajzen, 2019), the consequence of the exposure of the subject's entity to new information and experiences that can lead to changes in their beliefs, is to influence their intent, which consequently, influences their behavior.

Internet users, by changing their status on social networks, making public comments, etc., can behave under the "expectations", for them some important persons, and in this way express intentions about future behavior in real life. Also, real-life behavior toward expectations is expressed by mimicking and supporting the views and activities of significant individuals. Overall conclusions of contemporary projecting of SC as an "operation of influence" in cyberspace are: 1) The behavior on the Internet shortens the selection of the target group of psychological operations (PO) in cyberspace; 2) The application of modern information technology shortens the time of the selection of the target group for PO; 3) The means of mass communication have gained a new role in a modern society based on the influence of the media influence and political power, concentrated in certain social structures (Mitrovic & Vulic, 2019).

### *PSYCHOLOGICAL IMPACT IN CYBERSPACE*

Achieving psychological impact in cyberspace, as a form of social influence, has the aim to change the perception or behavior of people through concealment, deception or abuse. This topic was elaborated by Braiker (Braiker, 2004) and we intend to assess it through multi-criteria testing.

Manipulation is the term that describes the usage of various data or information for the "seduction of the public", in psychology it is also used in the meaning of a special manipulative, versus verbal ability (Vidanović, 2006). Potential victims of manipulators on social networks are aware that they set content to their profile on social networks, and the psychological characteristics can be detected from that content without the intention of the social network user. For a manipulator, an analysis of the content of a social network profile offers a personality draft profile of a potential victim.

#### *Methods of Psychological Manipulation*

The most commonly used methods of psychological manipulation are: 1) manipulation of fear, 2) manipulating the sense of guilt, 3) the method of small and larger demands, 4) encouraging projection, 5) provoking narcissism, 6) violation of privacy and 7) relativizing the truth.

1) Manipulating with fear – “fear – then – relief”; Fear is the primary emotion that arises from the perception or expectation of real or imaginary danger, or a serious threat. One of the most expressive fears especially occurs during adolescence, and it is the fear of social rejection (Bernstein & Borchardt, 1991). This method can be reasonably considered the most insidious of all, and psychologists call it the "fear-then-relief" method that relies on the manipulation of human emotions.

2) Manipulating the sense of guilt – “social exchange”; It is described as the interpersonal strategy of influencing where person A awards B (psychological or material), and in return, when A asks B for some favor in return, B feels the (inner) pressure to obey in favor of A's request (Benoit & Benoit, 2007).

3) Provocation of sensitivity - the method of small and higher requirements – “Foot-in-the-door” technique; This technique of manipulation is very perfidious, and at the same time imperceptible and simple. Using the "Foot-in-the-door" (Rot, 2006) method, the abuser at the beginning asks the victim for a small and simple service, followed by a new, significant requirement.

4) Encourage projection; The technique improves compliance with the interviewer by monitoring his behavior or gesture and using it in the communication process. Generally, people have positive affection toward similar gestures (mirror projection) and communication-based on projection results with a positive outcome. However, if the interlocutor consciously notes that someone copies it, it can completely break down the compliance (Pineda, 2007).

5) Provoking narcissism - setting-specific issues; The Meta model (Schwarz, Knäuper, & Oyserman, 2008), could prevent the loss of information in communication. The Meta model helps to ask specific questions (*How exactly? What exactly?*). That will provide more information and preventive conflict avoidance.

6) Violation of privacy - Milton's model; The Milton model (Laguerre, 2017) is built around the idea that using a deliberately vague and general language allows your interlocutor to open up his thoughts more easily. Unspecified language refers to words and expressions like somehow, everyone, always, the opinion is valid, people say, is generally known, etc. Using the Milton model increases the chance that the spoken sentence will be in line with the experience of the interviewer.

7) Relativizing the truth – “Yes – set”; This set is a series of statements or questions that the interlocutor answers or thinks, “yes, yes, yes...”. This repetitive self-obedience opens the stage when an on key question interlocutor will also respond with "yes" (Gravetter & Forzano, 2015).

### *Applying the Process of Psychological Manipulation*

The application of the manipulation method depends on the goal that has to be achieved. The application of methods of psychological manipulation in this paper is illustrated by the example of recruiting people for acts of terrorism based on the abuse of religion on the social network *Facebook*. Steps in the process consider *the definition of the target group* (based on the preview of the social network profile) and *mobilization*. The target group is usually in a pool of young people with problems such as poverty, poor relationships with their families, marginalized groups, from conflict regions, areas with extensive religious conflicts or in societies with significant deviation regarding traditional values. The process of mobilization considers three main process phases – the search, rapprochement and offer.

1) Search is the first step on websites of religious communities, self-taught teachers - interpreters of religion, religious schools and universities or on illegal websites known as "Dark Web". Recruiters (also referred to as "predators") are, most usually, people with excellent "communication" skills. On their social network's posts, they establish content about quite common things, such as devotion to faith, religious morality, avoiding any extremist intentions. The evaluation of the potential candidates' is realized through manipulative methods such as encouraging projection, perceiving inertia attitudes, adaptable non-verbal communication, experience, activities and the degree of socialization.

On Facebook, searching for "friends" is commonly possible by application suggestion, based on the network of existing or possible "friends" ("people you may know"), or by expressed and similar interest ("you may be also interested"). The profile Timeline on Facebook is the "pool" of your current "friends" and this is the best place to look for new friends based on similar interests. Favorite sites and groups on Facebook are also "good" places to search for victims because people who visit those sites have at least one thing in common with the predator. On his profile, the predator creates a "mirror" using previous knowledge about the interviewee (target) attitudes and activities. The implementation considers the following activities:

- Predator access to the *Timeline* of one of the Facebook profiles who has similar interests or interests as the predator. They found a post that the target (victim) particularly likes. Accessing the person who likes or comments on this post, the predator comes to the Timeline of that (targeted) person.

- On the selected Facebook profile, while scrolling through the Timelines, the victim (target) reads the predator's post. By choosing the link "More" below the photo on the cover page of the profile, you can see what types of movies, books, TV shows or music likes, and sees all other interests of the victim.

- By activating the "follow" menu in a photo or set profile image, the future public postings of the victim will appear in the news on the predator pro-

file. The predator marks public posts with "liking" and commented on how to create "mirrors" to start a friendship with the victim. When the predator finds it appropriate, they send a message asking for friendship.

2) Rapprochement starts after choosing the victim, when the predator aims to get closer to them. The predator does their own research, analyzing and learning everything about the family, the past, the interests, and weaknesses of its victim. The manipulative methods used in this step are provoking narcissism - setting up specific questions, manipulating the sense of guilt or social exchange and the methods of deterring privacy using Milton's patterns. This friendly help can be psychological or material. After assisting, the victim feels the pressure to rebound against the demand of the predator, then the predator goes to the next step.

3) The predator offers sacrifices in the form of faith and joins the group or organization that "fights for the right goal". The victim finally feels accepted and purposeful. Relationships with the organization are growing, and with them, a range of crimes that the newcomers are willing to do in return. The manipulative methods applied here are relativization of the truth - "Yes - set", provocation of sensitivity - the method of small and higher demands - the technique of "foot in the door" and the manipulation of fear - frightening and scattering.

### *METHODOLOGY AND INTERPRETATION OF RESULTS*

To determine the degree of awareness of exposure, and the categorical determination of possible vulnerability to psychological manipulations, as well as preparing preventive measures on social network behavior, we conduct an online survey. The online survey involved 250 people from the Republic of Serbia (75), The Republic of North Macedonia (50), the Republic of Croatia (50), Bosnia and Herzegovina (25), the Russian Federation (25) and the United States (25). The surveyed group consisted of 150 males and 100 females. The educational structure of the respondents is as follows: high school degree - 50 persons, bachelor degree - 100 persons and a master's degree - 100 people. For the survey of 250 respondents, an on-line questionnaire was prepared using the Likert scale of attitudes with the task of expressing the degree of agreement or disagreement on a five-step scale for each claim: "I do not agree at all," "I do not agree," "I do not have an opinion," "I agree" and "I totally agree".

The data processing of the survey was realized in the software tool for statistical data processing "Statistical Package for the Social Sciences". The results are shown in Table 1.

The results of the research indicate that although 79.6% of the respondents are knowingly aware of the possible danger of being manipulated on social networks, they do not check the profile of someone who

wants to be their “friend”, but respond to the unknown without previously checking the news on social networks.

*Table 1. The data processing of the realized survey*

Attitude	Strongly disagree	I do not agree	No opinion	I agree	Strongly agree	Total
Through social networks getting messages that scare me	-	-	-	79%	19,9%	99,6%
				99,6%		
Sometimes I do not agree to do something I do not want	19,9%	59,8%	19,9%	-	-	99,6%
	79,7%					
When I have a problem, I always turn to my first family for help	10%	69,7%	10%	10%	-	99,6%
	79,7%		10%			
I agree to help a friend	-	10%	10%	69,7%	10%	99,6%
	10%			79,7%		
I have a feeling of guilt after accepting a friend's help	-	-	10%	69,7%	19,9%	99,6%
				89,6%		
I put my own images and members of my family on my profile	-	10%	10%	59,8%	19,8%	99,6%
	10%			79,6%		
I often comment on events	-	10%	10%	69,6%	10%	99,6%
	10%			79,6%		
I explicitly respond to explicit scenes of violence	-	-	10%	79,6%	10%	99,6%
				89,6%		
I never answer unknown people	49,8%	39,8%	10%	-	-	99,6%
	89,6%					
I do not share my status on the profile publicly	-	10%	10%	69,6%	10%	99,6%
	10%			79,6%		
Always check the profile of someone who wants to be my friend	10%	79,6%	10%	-	-	99,6%
	89,6%					
I am aware of the danger of being manipulated	-	10%	10%	59,8%	19,8%	99,6%
	10%			79,6%		
I'm always looking for newspapers on social networks before activating an option	10%	79,6%	10%	-	-	99,6%
	89,6%					

### *PREVENTION OF PSYCHOLOGICAL MANIPULATIONS IN CYBERSPACE*

To define preventive measures from psychological manipulations in cyberspace, we use the methods of analytical hierarchical processes (AHP method). The aim was to convert non-material factors into numerical values and systematically evaluate the weights of selected variables in couples through a series of pairing (Saaty, 2008). In research, we used the software “Super Decision 2.6.0 – RC1“. AHP method is processed through three phases: 1) data collection, 2) valuation of relative value weights and 3) determining the solution to the problem.

Data collection was conducted "on-line" by interviewing ten experts in the domain field, who were asked to fill in Satie's attitude scale of nine points to rank the importance of the criteria in pairs comparison. The results in Table 2 express Satie's rock attitudes of nine points.

Table 2. *Satie's attitude scale of nine points regarding importance criteria.*

Scale	Explanation / Ranking
9	Absolutely most important / most preferably
8	Very strongly to the absolutely most important / most desirable
7	Very strong to very important / desirable
6	Strong to very strong
5	Stronger more important / desirable
4	Less to more stronger
3	Less relevant / more desirable
2	Equally to the weaker more
1	Equally important / desirable
0,50	Equally to the weaker ones
0,33	Less significantly less / preferably
0,25	Less strongly towards smaller
0,20	Strongly significantly less / preferably
0,17	Strong to very strong / small
0,14	Extremely vigorously less significant / desirable
0,13	Very strongly towards smaller absolute
0,11	Absolutely the least significant / desirable

The logic diagram of a possible solution for preventive measures, which could contribute to protection against psychological manipulation activities through social networks, is in Figure 1.

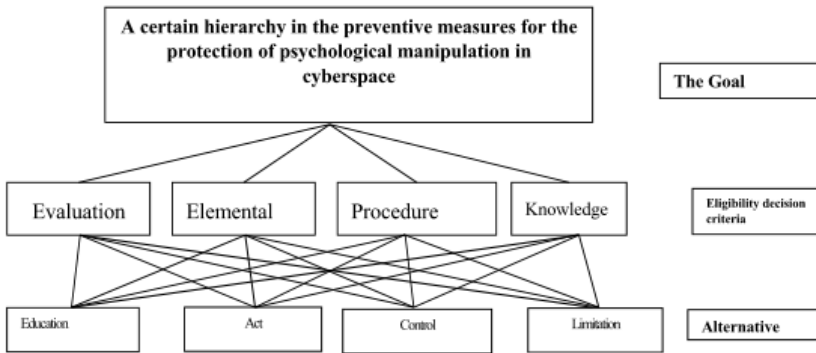


Figure 1. *Hierarchy logical network of acts and measures in cyberspace manipulation prevention*

As of mid-conclusion, alternatives for psychological manipulation are *education, method and control limitations*.

### *Determining the Solution to the Problem*

Determining the solution to the problem is the last phase of the AHP method, which means finding a positive normalized vector. After determining the sequence vector of the activity criteria in the model, in the next circle, it is necessary to determine the order of importance of the alternative in the model. Finally, the overall synthesis of the problem is the participation of each alternative multiplied by the weight of the observed criterion. The obtained data represents the influence weight of the observed alternative in the model. The results of the survey for ten experts from the domain area are in Table 3.

*Table 3. Experts' survey results regarding preventive alternatives*

	<b>Alternatives</b>	<b>Total</b>	<b>Normal</b>	<b>Ideal</b>	<b>Ranking</b>
Expert 1	education	0.3393	0.6786	1.0000	<b>1</b>
	control	0.0404	0.0809	0.1192	3
	limitations	0.0198	0.0395	0.0583	4
	act	0.1005	0.2010	0.2962	<b>2</b>
Expert2	education	0.3482	0.6963	1.0000	<b>1</b>
	control	0.0366	0.0732	0.1051	3
	limitations	0.0162	0.0323	0.0465	4
	act	0.0991	0.1982	0.2846	<b>2</b>
Expert 3	education	0.3461	0.6922	1.0000	<b>1</b>
	control	0.0359	0.0718	0.1038	3
	limitation	0.0146	0.0291	0.0421	4
	act	0.1034	0.2068	0.2988	<b>2</b>

Summarizing the results obtained by using the AHP method that determines hierarchy in the application of preventive measures to protect against psychological manipulations in cyberspace is of significance ranked according to the following:

- 1) First – "education", 100% confidence,
- 2) Second - "procedure", 90% confidence,
- 3) Third – "controlling", 90% confidence and
- 4) Fourth – "limits", 100% confidence.

### *PROPOSED MODEL IN THE APPLICATION OF PREVENTIVE MEASURES*

The prevention of harmful effects in cyberspace caused by psychological manipulations based on previous research implies the application of measures in the following domains: *education, procedures, control, and limitations*.

In the domain of education, it is necessary to take measures in the constant education of young people on all levels of education about the dangers that they could be exposed to social networks. Besides, an important segment is the education of both the teaching staff and parents.

Prevention considers procedures, which are needed to be taken to protect privacy on social networks. Useful recommendations consider to avoid blind trust regarding "default" settings on sites, but try to evaluate the "settings" to choose the appropriate level of protection. Also, it is better not to share close information about yourself, family, or anyone else in the "online" area, even personal contact information, in open form, as well as carefully use social networking based on locating ("geotagging", "FourSquare", "checking"). These services make your daily habits available to the broad public, even to those with malicious intent. Furthermore, the suggestion is that one should not "blindly accept" friend suggestions, nor allow access to people they do not know and do not trust. Regularly review your friends and delete those with whom you are not close. If you choose to add your professions or contacts from your profession to your network, consider the option of adding them to a separate list or group and limiting/protecting what you share with that list/group. Furthermore, everything that is published on the Internet can easily be split, drawn out of context, or abused. For sure, strong passwords to protect the login to a personal account are advised.

Control as a preventive measure is a set of procedures to gain insight into the degree of disruption of privacy and functionality on the one hand, and control of the validity of the sites we visit.

Restricting access to certain sites on the Internet, in particular social networks, is an alternative that is the lowest-ranked as a preventive measure and represents the ultimate measure, which is also a measure affecting the freedoms and rights of citizens. This measure is applied when the previous measures were not applied or when they did not yield results.

## *CONCLUSION*

Successful strategic communication (SC) has to be a planned activity where the key for success lies in the solid analyses of the environment, stakeholders and objects. The environment of communication has various dimensions and in the contemporary world, cyberspace has a unique significance, with strong influence in almost all physical dimensions. Supported by technology and globalization of media and broadband Internet contexts, especially through social networks, cyberspace is a strong tool for shaping the public opinion, behavior predictions, as well as attitudes and mass motivation management.

In this paper, methods of psychological manipulation are analyzed as a kind of social impact that aims to change the perception or behavior of other people by concealing, deceiving or abusing. Research consequently aims to examine the relation of SC and abusing of Internet social networks, from point of national defense and security, in the form of mobilization for extremism and terrorism. An online survey of 250 respondents determined the level of awareness about exposure to psychological manipulations, categorical determination, and preventive measures against their influence.



The research results indicate a low level of social network abuse knowledge, insufficient motivation for education, without the knowledge of procedures that can reduce the negative effect of psychological manipulations, and lack of control of truthfulness and evaluation of Internet content. Social networks, because of their popularity and “easy and quick” access, represent unique favorable polygons for achieving malicious psychological manipulation and influence.

The application of the AHP method in this work identifies measures of prevention against harmful effects in cyberspace caused by psychological manipulations, and these are ranked by significance to the following: education, procedures, control, and limitations. Based on the identified measures and their significance as ranked preventive measures, the proposal of modeling contents for preventive measures against psychological manipulations in cyberspace is elaborated.

The results of the researches shown in this paper point to the danger of predators acting on the belief of potential victims, which, in the end, can have great negative consequences for both the individual and the wider social community in form of rising extremism beliefs and terrorists acting.

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## **СТРАТЕШКА КОМУНИКАЦИЈА И УТИЦАЈ ДРУШТВЕНИХ МРЕЖА: МЕТОДЕ ПСИХОЛОШКИХ МАНИПУЛАЦИЈА У САЈБЕР ПРОСТОРУ И ПРЕДЛОГ ЊИХОВОГ СПРЕЧАВАЊА**

**Мирослав Митровић<sup>1</sup>, Драган Васиљевић<sup>2</sup>**

<sup>1</sup>Институт за стратешка истраживања, Универзитет одбране Београд, Србија

<sup>2</sup>Генералштаб Војске Србије, Србија

### **Резиме**

Стратешка комуникација представља једну од резултанти друштвених интеракција у глобалном свету. Кроз њу се читава широк спектар комуникацијских форми које су од одлучујућег утицаја на остваривање мисије организације. Државе спровођењем стратешке комуникације остварују циљеве који су од највишег националног значаја, а налазе се у дискурсу јавне и класичне дипломатије, пропаганде, лобирања итд. Стратешка комуникација се спроводи у свим сферама деловања људске размене информација, па тако и у сајбер простору. У овом виртуелном простору су услед готово непрекидне технолошке револуције у актуелном тренутку интензивне све, па и манипулативне, комуникацијске праксе. Са становишта стратешке комуникације, од значаја за националну одбрану и безбедност, посебно су битне мотивишуће форме утицаја на когнитивне и психолошке карактеристике популације.

Осим мотивишућих утицаја, који позитивно опредељују популацију према питањима од значаја за одбрану и безбедност, са становишта истраживања у области одбране, од великог значаја су комуникацијске форме које неповољно и деструктивно утичу на друштво. Овакве појаве су у савременој теорији конфликта препознате као један од садржаја неконвенционалних, хибридних форми угрожавања безбедности.

У остваривању циљева, које се у овом раду односи на потенцијално врбовање за екстремистичко и терористичко деловање на основу злоупотребе садржаја на друштвеној мрежи Фејсбук, субјекти манипулације према жртвама користе све до сада од науке и праксе препознате методе управљања вољом, предвидивог понашања и психолошких манипулација.

У раду се, на основу анализе психолошких модела управљања понашањем и психолошких манипулација, приступило емпиријском истраживању, спроведном преко интернета, у коме је анализирана свест корисника о опасностима и могућим манипулативним садржајима на друштвеној мрежи Фејсбук. Даљом применом АНР методе, извршено је рангирање потенцијалних форми превенције и одбране од зло-

употреба на друштвеним mrežama. Истраживање у форми закључка сведено нуди садржаје и активности којима је могуће обезбедити превенцију, одбијање и одбрану од злоупотребе личних садржаја на друштвеним mrežama, а који могу послужити као основа за примену манипулативних психолошких форми. На овај начин, превенција у домену комуникације на интернету омогућава далекосежне ефекте на стратешку комуникацију од значаја за државу, омогућавањем потенцијалног спречавања малициозног продора у свест појединца, који се спроводи са циљем његове мобилизације за деловање опасно по националну одбрану и безбедност.

## THE SINO-WESTERN BALKANS RELATIONS WITHIN "BELT AND ROAD" INITIATIVE AMIDST THE WORLD'S GRAPPLING WITH THE RISE OF CHINA

Sanja Arežina\*

Government of the Republic of Serbia, Belgrade, Serbia

### Abstract

The Sino-Western Balkans cooperation has advanced significantly since the Great Recession and the Eurozone crisis. Relations were developed at the bilateral and multilateral levels, within the "One Belt, One Road" Initiative (Belt and Road Initiative – BRI) which was promoted in 2013 and which included the previously established Mechanism of Cooperation between China and the Central and Eastern European Countries ("17+1" Mechanism). Although the Chinese President Xi Jinping called BRI a "project of the century" in 2017, new international circumstances caused by the intensified Sino-US rivalry and the COVID-19 pandemic made the Chinese leadership reconsider activities and funding abroad, and adjust the new 14th Five-Year Plan with changes that have taken place in the past five years. They decided that China will focus on "dual circulation" in the coming period, i.e. to reduce the numerous activities and investments (and loans) within the BRI, and to redirect funds to investing in domestic capacities. In this article, the author discusses the China-Western Balkans relations from 1949 until 2013 when the BRI implementation started, the factors influencing China's cooperation with the Western Balkans and analyzes the progress of cooperation after the start of the BRI implementation compared to the previous period. In order to prove the basic hypothesis, that Sino-Western Balkan cooperation within the "Belt and Road" Initiative will continue to develop in a positive direction, despite the influence of negative factors, and above all due to the good results achieved within the "Belt and Road" Initiative in 2013, the author uses the structural-functional analysis, comparative analysis, induction and deduction.

**Key words:** China, Western Balkans, "Belt and Road" Initiative, European Union, United States.

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\* Аутор за кореспонденцију: Сања Арежина, Влада Републике Србије, Немањина 22–26, 11000 Београд, Србија, [sanja\\_arezina@yahoo.com](mailto:sanja_arezina@yahoo.com)

## ОДНОСИ КИНЕ И ЗАПАДНОГ БАЛКАНА У ОКВИРУ „ПОЈАС И ПУТ” ИНИЦИЈАТИВЕ УСРЕД СВЕТСКЕ БОРБЕ СА РАСТОМ КИНЕ

### Апстракт

Сарадња између Кине и Западног Балкана значајно је напредовала након Велике рецесије и кризе Еврозоне. Односи су развијани на билатералном и мултилатералном нивоу, у оквиру „Један појас, један пут” иницијативе (иницијатива „Појас и пут” – БРИ), која је промовисана 2013. године и која је обухватила претходноосновани Механизам сарадње Кине и земаља Централне и Источне Европе (Механизам „17 + 1”). Иако је кинески председник Си Ђинпинг 2017. године БРИ назвао „пројектом века”, нове међународне околности, изазване појачаним ривалством између САД и Кине, као и пандемијом вируса корона SARS-CoV-2, учиниле су да кинеско руководство преиспита активности и финансирања у иностранству, а нови, 14. по реду, Петогодишњи план усклади са променама које су се десиле у претходних пет година. Одлучено је да у наредном периоду Кина фокус стави на „двоструку циркулацију”, односно да смањи број активности и инвестиција (и зајмова) у оквиру БРИ и да средства преусмери на инвестирање у домаће капацитете. Ауторка у чланку разматра односе Кине и Западног Балкана од 1949. године до 2013. године, када је започела примена БРИ, факторе који утичу на сарадњу Кине са државама Западног Балкана и анализира напредак сарадње након почетка примене БРИ у односу на претходни период. Да би доказала основну хипотезу да ће се кинеско-западнобалканска сарадња у оквиру иницијативе „Појас и пут” и даље развијати у позитивном смеру, упркос утицају негативних фактора, а пре свега због добрих резултата постигнутих у оквиру иницијативе „Појас и пут” 2013. године, ауторка користи структурно-функционалну анализу, компаративну анализу, индукцију и дедукцију.

**Кључне речи:** Кина, Западни Балкан, иницијатива „Појас и пут”, Европска унија, Сједињене Америчке Државе.

### INTRODUCTION

At the beginning of the 21<sup>st</sup> century, when China reached a high rate of foreign exchange reserves, and especially after the Global Financial Crisis of 2008, when most of the state economies were facing its effects in the lobby or at the very epicenter of the recession, a growing number of European national and non-state actors began to perceive Beijing as a potential partner for cooperation (Song, 2012). While helping the EU countries during the crisis, China has prevented the weakening of the EU as an important actor in safeguarding the multipolar world and as its export market, a source of new technology and equipment and one of the largest sources of foreign investment (COASI, 2018). At the same time, it has reduced the possibility to suffer losses itself with the ambition to open up the European market for Chinese investments and wanting to influence European officials to ease arms trade restrictions and sensitive high-tech products that are necessary for the new national economic model and

achieving the "Chinese dream" by 2049 (*Zhongguo Meng*) (Gong, 2013).<sup>1</sup> Through such behavior, China wanted to demonstrate that it represents a "responsible great power" (*Fuzeren de Daguo*) in solving global issues (Arežina, 2018, p. 147).

Simultaneously with the more intensive development of Sino-EU relations, China improved relations with the region for which the European Union has devised a special political name – the Western Balkans, which consists of five non-EU countries: Serbia, Montenegro, Bosnia and Herzegovina, North Macedonia and Albania. It did so bilaterally and multilaterally through the Mechanism of Cooperation between China and the Central and Eastern European Countries – CEEC's (the so-called "16+1" Mechanism or "17+1" Mechanism) which was established in 2012. Thanks to this, the exchange of high-level visits and trade cooperation has been enhanced, the amount of Chinese foreign direct investment has increased, and numerous partnership agreements have been signed.

Progress in cooperation has continued following the promotion of "One Belt, One Road" Initiative ("Belt and Road" initiative – BRI, *Yidai Yilu*) by Chinese President Xi Jinping in 2013, which aims to link the two economically developed parts of Eurasia (Western Europe and the eastern part of China) by land and sea, and bringing benefits to all states along this road. This initiative included sporadic smaller projects implemented in the past by China along the ancient Silk Road route, as well as existing mechanisms for cooperation with countries along the road, including the "17+1" Mechanism (Arežina 2018, p. 254).

Although, in 2017, President Xi Jinping called the "Belt and Road" Initiative "a project of the century" in which China will invest 1 trillion dollars, due to the growth of the negative narrative about China (because of the strengthening of the Sino-US rivalry) and China's inability to collect borrowed money due to the crisis caused by the COVID-19 pandemic, at the meeting of the Politburo held in May 2020 the Chinese leadership decided that China will focus on internal circulation in the next five years. In this regard, the new 14th Five-Year Plan (2021-2025) relies more on "dual circulation" according to which China will continue to invest abroad, but the significant amount of money invested in BRI so far will be redirected to the domestic market (Kynge, Wheatley, 2020). This means that Chinese investments and loans within "Belt and Road" initiative will decrease in the coming period, and China will continue to invest and lend only to countries with which it has extremely good political relations and which are able to repay their debts. Therefore, the basic hypothesis of this research is that the Sino-Western Balkans cooperation within

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<sup>1</sup> In November 2012, at the Third Plenum of 18<sup>th</sup> Congress, President Xi Jinping mentioned the vision of the "Chinese Dream", which he subsequently clarified as the accomplishment of a large number of internal reforms agreed in the Program of 60-point.

the "Belt and Road" Initiative will continue to develop in a positive direction despite the influence of negative factors, primarily due to win-win results achieved after the promotion of the "Belt and Road" Initiative in 2013.

In the past period, researches on the relationship between China and the Western Balkans countries have focused mainly on the positive and negative aspects of cooperation. This research focuses on the comparative analysis of Sino-Western Balkans cooperation before and after the promotion of the "Belt and Road" Initiative, and the factors that influence the dynamics of their relationship. In the research, the author answers the following questions: What were the Sino-Western Balkans relations before the start of the implementation BRI? What were the Sino-Western Balkans relations after the start of the implementation of BRI? What factors affect the dynamics of the BRI implementation in Western Balkans? What is the future of this cooperation? To be able to prove the basic hypothesis, the author uses the structural-functional analysis, comparative analysis, induction, and deduction. The research will use relevant academic and policy documentation, official statements and news from the US, Chinese, European and other international media. Also, for the sake of authenticity, the research was enriched by formal and informal interviews and conversations the author had with the US, the European and the Chinese officials, analysts, researchers, journalists and businessmen who were directly involved in the various aspects of Sino-European relations.

The article has five parts. In the introduction, the author gives the context for the research, explains the crux of the problem and sets out the hypotheses. In the second part, the author explains the history of Sino-Western Balkans relations before the promotion of the "Belt and Road" Initiative. In the third part, the author outlines the factors that affect cooperation between China and the Western Balkan countries within the "Belt and Road" Initiative. The fourth part provides the comparative analysis of Sino-Western Balkans cooperation before and after the start of the BRI implementation. The concluding remarks will summarize the research and the conclusions reached, after which the author draws a conclusion on BRI's role in the ongoing development of Sino-Western Balkans cooperation, provides a projection of the direction of the future Sino-Western Balkans relations and makes recommendations for further cooperation within the "Belt and Road" Initiative.

#### *THE HISTORY OF SINO-WESTERN BALKANS RELATIONS BEFORE THE "BELT AND ROAD" INITIATIVE IMPLEMENTATION*

In the previous period, there was no Chinese official document with an explicitly defined attitude towards the Western Balkans as a separate region at the European continent. However, China has always seen



this region as an integral part of Southeast Europe, and then, since 2012, after the formation of the "17+1" Mechanism this region was placed within the framework of the wider Central and Eastern European region (Mitrović, 2011, p. 265).

Bilateral relations between China and Western Balkan countries began to develop in 1949, after Mao Zedong proclaimed the founding of the PR China at Tiananmen Square. China's diplomatic relations with Yugoslavia have had their ups and downs, while diplomatic relations with Albania were at a very high level until the late 1970s. However, shortly after the Yugoslav President Josip Broz Tito's visit to Beijing in 1977, party relations between China and Albania were severed, and those between China and Yugoslavia established. During the 1980s, a large number of high-level political delegations were exchanged between China and Yugoslavia, as well as experts who were very important for the process of "reform and opening up" China (Arežina, 2018, p. 223).

After the end of the Cold War and the fall of the communist regimes in Eastern Europe, the Western Balkan countries began to pursue a predominantly Western-oriented foreign policy, promoting the Euro-Atlantic integration as one of the most important foreign policy goals. During the Eurocrisis in 2009, the Western Balkan countries very quickly adopted the "Opening to the East" strategy, actively absorbing investments that come from China, in order to fill the existing vacuum created by the lack of fresh money in the Eurozone countries and continue their economic growth (Liu, 2013, p. 3). In this sense, they seek to strengthen bilateral relations with China (political, economic, cultural, etc.), and also multilaterally within the "17+1" Mechanism established by China in 2012. So far, 9 economic and trade forums and 8 political summits of the prime ministers of Central and Eastern European countries and China have been held.<sup>2</sup> In the course of time, numerous institutional mechanisms for cooperation in various fields were developed between China and the Western Balkans countries within this Mechanism, in which cooperation progressed in all segments: strengthening bilateral trade, two-way investment, infrastructure cooperation, deepening fiscal and financial cooperation and exchanging experts in various fields (Wen, 2011).

In 2012, as support to the Mechanism, Beijing established an Investment Fund with the initial capitalization of 10+3 billion dollars, which was spent to revitalize and build infrastructure in the CEE region, as well as to support Chinese companies for active participation in public-private partnerships and the privatization processes in this region. After

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<sup>2</sup> The summits are held in Budapest (2011), in Warsaw (2012), in Bucharest (2013), in Belgrade (2014), in Suzhou (2015), in Riga (2016), in Budapest (2016), in Sofia (2018), in Dubrovnik (2019). Due to the COVID-19 pandemic, no summit was held during 2020.

the Chinese President Xi Jinping promoted the "Belt and Road" Initiative in 2013, which represents a transcontinental long-term policy and investment program of China which aims to connect Asia with Africa and Europe via land and maritime networks in order to improve regional integration, increasing trade and stimulating economic growth, the "17+1" Mechanism has become an integral part of it, along with all the projects previously implemented in this region (including Western Balkans). Over the years, the cooperation has developed in various areas within BRI, from people to people exchanges to infrastructure, energy, social and cultural projects (Arežina, 2018, p. 254).

### *THE FACTORS THAT AFFECT THE SINO-WESTERN BALKANS COOPERATION WITHIN THE "BELT AND ROAD" INITIATIVE*

China-Western Balkans relations are influenced by a number of different factors, most notably *the importance of China in the 21<sup>st</sup> century as an international contributor to solving global problems*. As a permanent member of the UN Security Council, a nuclear power, the largest holder of foreign exchange reserves and a UN peacekeeping contributor, its voice has great weight internationally. Consequently, most countries tend to establish, preserve and strengthen good relations with Beijing, which also applies to the Western Balkans region.

The second factor is *the traditionally good relations of the Western Balkan countries with China*. Namely, all the countries of this region, as part of the Eastern Bloc, recognized the PR China soon after the Soviet Union did, in 1949 (Liu, 2013, p. 3). However, at that time, although most of them were communist countries, only Albania had party relations with China in addition to diplomatic relations. In the late 1970s, China broke off party relations with Albania and established it with the SFR Yugoslavia, which during the period of "opening up" provided the greatest support for Chinese reforms. With the end of the Cold War, following the fall of communist regimes (and the breakup of the SFR Yugoslavia), the Western Balkan countries are beginning to pursue a foreign policy predominantly West oriented, promoting EU integration as one of their foreign policy goals. China is supporting them in this, having in mind, first and foremost, the need for partners in the decision-making process within their respective European policies.

The third significant factor affecting China's relations with the Western Balkan countries is *the region's good geographical position and proximity to the EU market*. Namely, because of its strong economic expansion over the past few decades, and especially after the Global Financial Crisis of 2008, China has made it possible to place surplus capital to markets around the world, as well as to the European market, thanks to the "Belt and Road" Initiative. In this regard, the Western Balkans region is a

geographical link, within the maritime component of this project, between Greece, where the Chinese company COSCO has been involved in the operation of the Port of Piraeus since 2009, and Central and Western Europe. Thus, Chinese products arrive by sea from China to the Piraeus port, and then are transported further by road and railway (Corridor 10) through North Macedonia, Serbia and Hungary to Central and Western Europe.

In addition, the Western Balkans region is a form of preparatory ground on which Chinese companies gain experience in operating in accordance with the EU standards, but without the stronger EU competition or stronger EU regulatory pressure. This is especially significant after the failure of the Chinese company COVEC to build a highway between Berlin and Warsaw. It also corresponds to Chinese companies that these countries have direct and privileged access to the entire EU market, lower taxes, qualified low-income labor, and the ability to provide state guarantees in order to receive preferential loans, which EU member countries are unable to do (Arežina, 2020b, p. 8).

The fourth factor is *the Western Balkan countries' need for fresh capital* to fill the investment vacuum created by the weakening economic and financial capacity of most of the European countries during the Global Financial Crisis and the Eurozone Crisis. The lack of funding in developed European countries amid the Eurozone crisis is an important reason why countries in the region have turned to partnering with China in order to attract as much funding as possible. This factor is even more pronounced in the context of the Sino-US rivalry and the COVID-19 pandemic. Unlike EU member countries that have the ability to use Structural and Cohesion Funds, as well as different emergency and solidarity funds, the Western Balkan countries have the opportunity to get preferential loans no strings attached from Chinese banks for 10-20 years at 2-4% interest rate and the 3 to 7-year grace period.

The fifth important factor affecting China's relations with the Western Balkan countries is *relations with the European Union*. After the end of the Cold War and the fall of communist regimes in Eastern Europe, the Western Balkan countries began to pursue a predominantly Western-oriented foreign policy, promoting the Euro-Atlantic integration as one of the most important foreign policy goals. However, although these countries have been in the process of stabilization and association for almost two decades, none of them has yet become an EU member country. Montenegro and Serbia are candidates for membership that have opened majority of negotiation chapters. North Macedonia and Albania are also the EU candidate countries, but although they received the green light to open the accession negotiations in March 2020, the date for the start of the negotiations has not yet been set. Bosnia and Herzegovina has not yet become a candidate country (Arežina, 2020a, p. 4). Due to slow progress, the lack of clear and explicit promises that the expansion of EU will continue, as well as the less attractive vision of EU

membership, in some of them, such as Serbia and Bosnia and Herzegovina, public opinion is mostly negative towards EU integration (Arežina, 2020a, p. 5). Therefore, these countries often do not harmonize their regulations with EU regulations (they sign interstate agreements without conducting public tenders, do not harmonize foreign policy decisions with EU decisions, etc.), which causes a feeling of insufficient commitment of these countries to the process of European integration.

On the other hand, Beijing wants to have good partnership relations with Brussels, primarily because they share the interest for a more balanced international order based on effective multilateralism. China and the EU are significant trading partners, with around 1.5 billion euros in daily trading, which is especially important because of the economic consequences of the COVID-19 pandemic. The European Union market is very important for exporting Chinese products and placing Chinese investment given the Sino-US rivalry that has existed since 2017, and vice versa. However, after the establishment of the "17+1" Mechanism in 2012, some statements by Brussels officials indicated that the EU was increasingly perceiving this mechanism as a "Trojan horse" and one more step in a series of Chinese attempts to enter the European Union through the back door and divide it into the East and the West. Therefore, CEE countries and especially EU candidate countries from the Western Balkans were advised not to "violate EU regulations" when concluding economic agreements with China, and a warning was issued regarding the use of preferential Chinese loans, due to the possibility of it being a "debt trap" (Arežina, 2018, p. 248; United State Senate, 2018).

In order to prevent animosity towards strengthening China's cooperation with the CEE and especially the Western Balkans, Chinese officials have always stated in their statements that the aim of this cooperation is to develop a regional approach based on equality and mutual respect and benefit, mutual development and effort, in order to advance relations between China and Europe. According to them, China's relationship with this region is not an attempt to implement the "conquer and rule" strategy, but to build one more Chinese "bridge to Europe", which, above all, should serve as a way to strengthen relations with the European Union (Xinhua, 2013).<sup>3</sup> At the same time, officials from CEE countries stressed that their intention was not to form a bloc against the EU, but to act in accordance with EU regulative (Pavličević, 2019, p. 464). Moreover, in practice, these countries are bigger rivals among themselves therefore wanting to attract Chinese investment more than wanting to provoke negative reactions from Brussels.

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<sup>3</sup> The example of this is the Chinese insistence that Greece remains within the Eurozone not to weaken EU's position in the global economy.

The sixth significant factor, and perhaps the most significant impact to China's relations with the Western Balkan countries, is *relations with the US*. As the largest global power that guarantees security to many allies, the US are in a position to impose their foreign policy views and goals on other countries in the world. Unlike President Barack Obama's tenure, when China was a constructive partner ("Chimerica"), President Donald Trump's rise to power changed the existing perception of "China as a partner" to "China as a potential rival" (Ferguson, 2007). When the US began the "trade war" with China, the US Secretary of State, Mike Pompeo, gave the opportunity to the allies to show how willing they were to pursue the US interests around the world. Washington has called on Brussels to combat the unfair Chinese trade with a view to reducing the takeover of sensitive hi-tech technologies on the European continent. This led the European Union to start blocking the acquisition of certain security-sensitive companies by Chinese companies and seek to accelerate the introduction of protective measures in the European market that would restrict the entry of Chinese capital, especially in security-sensitive sectors (EU Screening Mechanism for Foreign Direct Investment, International Public Procurement Instrument, Improvement of Labor and Ecological Standards, etc.) (US Embassy of Georgia, 2017; Smith, 2018). In addition, Brussels went one step further and referred to China in March 2019 as a "systemic rival and economic competitor", which was reaffirmed again in October 2020. These Brussels' policies, as well as the restrictive measures introduced by the Chinese leadership in August 2017 to increase controls on the exit of capital from the country, have resulted in a reduction of Chinese investments in the European Union market from 37.3 billion euros in 2016 to 29.1 billion euros in 2017, 17.3 billion euros in 2018, and 11.7 billion euros in 2019 (Hanemann, 2018; Rhodium Group, 2019). At the same time, when it comes to the Western Balkan countries, there is a tendency to increase the number of Chinese investments and start projects for which funds are obtained through Chinese banks as preferential loans.

The seventh significant factor is *the COVID-19 pandemic*. In August 2017, China introduced certain restrictions on the approval of funds for investments and loans to Chinese companies abroad. After that, the Sino-US rivalry, which has begun to spill over to Washington's allies, has further reduced opportunities for Chinese investment abroad. However, the most significant reduction of the Chinese investments and loans within BRI came due to the crisis caused by the COVID-19 pandemic in 2020. During this period, Chinese outbound investment was only 14.11 billion dollars (Ministry of Commerce of the PR China, 2020), while Chinese financial institutions approved only 4 billion dollars for outbound loans, which is a significantly smaller amount compared to the previous few years, especially to 75 billion dollars in 2016 (Kynge, Wheatley, 2020). Due to the inability to repay their debts, Chinese President Xi Jinping granted the relief of debts worth 2 billion

dollars for the least developed countries, while debt refinancing was negotiated with 18 countries. Moreover, the crisis was also felt by some Chinese companies due to delays in the implementation of projects, supply chain disruptions and unplanned cost increases. Therefore, at the meeting of the Politburo in May 2020, a decision was made that China will focus on internal circulation in the next five years. In this regard, the new 14<sup>th</sup> Five-Year Plan relies more on "dual circulation", according to which China will continue to invest abroad, but part of the money invested in BRI so far will be redirected to the domestic market (Kynge, Wheatley, 2020).

On the other hand, the Western Balkan economies are also burdened by the consequences of the pandemic. Their public debts are growing, as a result of which they will not be able to give state guarantees for taking preferential loans from Chinese financial institutions, but will have to finance projects through concessions or public-private partnerships. Also, the question is whether they will be able to finance the debts they have made so far towards their Chinese partners. For now, Serbia, Bosnia and Herzegovina and North Macedonia have a problem with the rise of public debt, but they still do not have problems with repaying debts to Chinese financial institutions. However, if the pandemic continues and the funds received from the EU are not enough to remedy the crisis caused by the pandemic, all governments will have to prioritize spending and support for households and businesses over the financing for BRI infrastructure projects. Montenegro and Albania have a high public debt because of tourism-dependent economy (over 80% of GDP), which is likely to result in seeking loans refinancing (Vukićević, 2020; Svetska Banka, 2020).

#### *COMPARATIVE ANALYSIS ON SINO-WESTERN BALKANS RELATIONS BEFORE 2013 AND AFTER THE PROMOTION OF THE "BELT AND ROAD" INITIATIVE*

In order to determine the effect of BRI on Sino-Western Balkans cooperation, it is necessary to make a comparative analysis of their cooperation in the period before the promotion of BRI and after 2013, when numerous initiatives in various areas began to be implemented within this initiative. The comparative analysis will cover five Western Balkan countries and the three most important areas of cooperation: political, economic and cultural cooperation. The intensity of cooperation will be measured by the number of realized projects in all three mentioned areas between China and the countries of this region in the period before the promotion of BRI and after 2013.

**Serbia.** *In the period before 2013*, Serbia signed the Strategic Partnership Agreement with China (2009), after which political relations progressed, especially regarding China's support to Serbia within the framework of international organizations concerning the membership of

Kosovo\*.<sup>4</sup> In the first years after the Agreement two high-level visits followed, the first by the Chinese President Hu Jintao in 2009 and the second by the Chairman of the Standing Committee of National People's Congress Wu Bangguo in 2010. Many significant agreements and memoranda were signed in the period up to 2013, but only few have been implemented (Arežina, 2018, p. 239). Most of them were projects that were realized with the support of Chinese preferential loans (revitalization of TPP Kostolac, construction of the "Mihajlo Pupin" bridge over the Danube), while there were almost no direct investments. The Confucius Institute at the University of Belgrade was founded in 2006.

*After the start of the BRI implementation*, the cooperation between Serbia and China has progressed significantly. In addition to the summit meetings between the prime ministers of the two countries, visits by other high-ranking Chinese officials were constantly exchanged within the "17+1" Mechanism and the Belt and Road Forum for International Cooperation. In 2016, the Chinese President Xi Jinping visited Serbia, and on that occasion, a Comprehensive Strategic Partnership Agreement was signed. Belgrade hosted the Summit of the prime ministers and the Economic and Trade Forum under the "17+1" Mechanism in 2014 (Arežina, 2018, p. 190). Also, Serbia has been selected to be the seat of the Secretariat for Infrastructure Projects of this mechanism and a member of the Asian Infrastructure Investment Bank (AIIB).

Although Serbia, like most countries in the world, has a trade deficit with China, a number of significant veterinary and phytosanitary certificates have been harmonized. As a result, the largest Serbian companies can export their herbal and animal products to the Chinese market. Serbia has attracted a large number of Chinese investments, most notably the purchase of the Steel Mill "Smederevo", Coper Miner and Smelter "Bor", the construction of a tire factory in Zrenjanin, a car parts factory in Loznica, a car lights factory in Niš, the industrial park "Mihajlo Pupin", etc. In addition to Chinese investments, Serbia has received significant funding from the Exim Bank under preferential conditions for the implementation of numerous infrastructure projects. The most significant projects are the Reconstruction Project of the Hungarian-Serbian Railway, which should be part of the Thessaloniki-Budapest railway link, the Obrenovac-Ub highway, the Lajkovac-Ljig highway, the Surčin-Obrenovac highway, the Preljina-Pozega highway, the Pozega-Boljari highway and the construction of the bypass around Belgrade. So far, Serbia has withdrawn about 7 billion dollars from the CEEC Investment Fund (investments are over 2

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<sup>4</sup> According to the UN Security Council Resolution 1244 (1999) Kosovo and Metohija is a provisionally administered UN territory within the FR Yugoslavia and then within the successor states – the Republic of Serbia.

billion dollars), with a tendency to reach 10 billion dollars after all the projects have been completed. Also, an additional Confucius Institute located in Novi Sad was opened in 2014. Serbia has opened a Cultural Center in Beijing, while the construction of the Chinese Culture Center in Belgrade is expected to be completed in 2021 at the same location where the former Embassy of the PR China was located before it was destroyed during the 1999 NATO bombing (Mondo, 2020). Chinese started to be taught in primary and secondary schools, as well as at the University of Belgrade.

*Montenegro. In the period before 2013*, Montenegro and China had relatively good co-operation (since diplomatic relations were established in 2006 after leaving the State Union of Serbia and Montenegro). However, there were no high-level visits, and apart from the 3 million dollars heavy truck assembly grant line, there were no significant Chinese investments and preferential loans during this period (Arežina, 2018, p. 235).

Relations began to develop more significantly only *after the start of the BRI implementation* and resulted in the signing of the Friendship and Cooperation Agreement in 2013 (Ministry of Foreign Affairs of the PR China, 2013). The High-level (Prime Minister) meetings have taken place mainly in the framework of the "17+1" Mechanism, as well as in other international events such as the Winter Olympics in Sochi in February 2014 and the Summer Youth Olympics in Nanjing in August 2014 (The Embassy of the PR China in Montenegro, 2016). There exists an inflow of Chinese direct investment to Montenegro through preferential loans. China's Exim Bank granted preferential loans for the purchase of four ships from Poly Technologies Group (Ekapija, 2009). Also, the loan was approved for the construction of a section of the road from Bar to Boljare (Smokovac-Mateševu), which sparked negative comments from 16 US senators who in August 2018 sent a letter to the US Secretary of State Mike Pompeo and the US Secretary of the Treasury Steven Mnuchin warning them of the problem in Montenegro and other countries (Pakistan, Sri Lanka and Djibouti) may have due to the unsustainable debts caused by Chinese loans (United States Senate 2018). Additionally, state electricity company "Elektroprivreda" signed a contract with Dongfang Electric Corp. on ecological reconstruction of TPP Pljevlje (1<sup>st</sup> block). In this period, the Confucius Institute was established at the University of Montenegro in 2015, and Chinese started to be taught in primary and secondary schools.

*Bosnia and Herzegovina. In the period before 2013*, political co-operation was at a very low level, with no high-level visits, direct investment and preferential loans.

*Only after the start of the BRI implementation* did the cooperation begin to develop, largely driven by the "17+1" Mechanism, which is essentially the only forum for top official visits. However, in recent years Bosnia and Herzegovina has become an increasingly attractive invest-



ment destination for the Chinese. There is very small amount of Chinese foreign direct investment, but there are more preferential loans granted by Chinese banks for various projects in Bosnia and Herzegovina, such as construction of TPP "Stanari", construction of TPP "Tuzla 7" and TPP "Banovići", a highway from Banja Luka to Mlinište, a hospital in Doboje, etc. It is important to note that the TPP "Stanari" is the first energy facility in Bosnia and Herzegovina that operates in accordance with the EU directives on environmental protection (2001/80/ EC) (Ačanski, 2013). Chinese started to be taught in primary and secondary schools, as well as at two Confucius Institutes located in Sarajevo and Banja Luka (Hanban News, 2015; Hanban News, 2018).

*North Macedonia. In the period before 2013*, North Macedonia and China maintained good relations and exchanged official visits, but good relations were interrupted due to the Macedonian recognition of Taiwan in 1999, after which China suspended diplomatic relations with Macedonia (Global Policy Forum, 1999).<sup>5</sup> However, after two years, diplomatic relations were restored as well as political and economic cooperation between the two countries. Subsequently, a Joint Declaration on Deepening the Relationship of Mutual Cooperation and Benefits was signed in 2007 (China.org, 2009; The State Council of the PR China, 2007). However, the high-level visits did not occur, but the Chinese government donated 1.6 million dollars' worth school buses in 2011, and the Confucius Institute was opened at Saints Cyril and Methodius University of Skopje in which the North Macedonians have the opportunity to learn Chinese (Hanban News, 2013).

*After the start of the BRI implementation*, cooperation between the two countries has significantly deepened, and they have mostly been taking place within the established "17+1" Mechanism. North Macedonian exports to the Chinese market are much higher than in other countries in the region because Macedonia has high quality ferronics. There is little Chinese direct investment, most of them are projects with loans given by Chinese banks under preferential conditions. The most important project involving Chinese companies is the construction of the Kozjak hydroelectric plant in the Treska river canyon. Also, considerable Chinese funds were earmarked for the construction of the two highways – the western Kičevo–Ohrid and the eastern Miladinovci–Štip (Kraljevski, 2015). At the Summit of the prime ministers of "17+1" held in Belgrade in December 2014, the Macedonian Prime Minister Nikola Gruevski signed an agreement on building a fast railway from Budapest to Thessaloniki with Chinese Prime Minister Li Keqiang (China Military Online, 2014). In order to realize this project, the Macedonian government purchased six passenger trains

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<sup>5</sup> Macedonia recognized Taiwan due to a promise to receive direct economic investment assistance worth 235 million dollars.

from China Railway Rolling Stock Corporation, but the reconstruction and modernization of this railway has not yet started (Asia Times, 2016). Regarding cultural cooperation, North Macedonia is very important for China, because the seat of the Cultural Cooperation Coordination Center of "17+1" Mechanism is in Skopje.

*Albania. In the period before 2013*, Albania and China had good political relations. In 2001, Albania and China signed three agreements, covering the financial, mortgage and technical aspects of building the Bushat Hydro-power Station in northern Albania. In 2005, cooperation between the military forces of the two countries began, which opened new opportunities in the military sector (Poulain, 2017). Four years later, in April 2009, the Albanian Prime Minister Sali Berisha visited Beijing, and then the Joint Statement on deepening traditional friendly relations was signed. There were no high-level visits by Chinese officials to Albania (Arežina, 2020b, p. 5).

*After the start of the BRI implementation*, there were also very few bilateral contacts between the Chinese and Albanian leaders, except within the "17+1" Mechanism. Trade between the two countries has been increasing year by year, and China is today among Albania's five largest economic partners. In addition, the two countries also cooperate in the fields of culture, education, science and technology, agriculture, sports, radio and television, as well as within international forums. But, although co-operation under the "17+1" Mechanism and BRI helps relations between the two countries to go uphill and top officials meet several times a year, progress in relations is slow and symbolic, as evidenced by the lack of visits of the Chinese President and Prime Minister to Albania, as well as a small number of investments, which so far do not exceed the value of 800 million dollars. One of the most significant is the takeover of a Canadian oil company Banker's Petroleum, which operates in Albania, including the Patos-Marinze and Kucova oil fields, by Geo-Jade Petroleum Corp (Oil&Gas Journal, 2016). Also, the Chinese company Everbright Limited acquired the airport Mother Teresa in Tirana until 2027 through concession (Everbright, 2016). In addition, the Chinese company Sinomine Resource Exploration has established a daughter company in Albania, which is working on the construction of mines and geological tests in co-operation with the Albanian Geological Institute. In 2017, China granted a relatively modest 1.5 million euros to the Albanian government to modernize the agricultural sector, and 2 million dollars for the reconstruction of the National Theatre of Opera and Ballet and the Popular Ensemble (Qori, 2017). China also invests heavily in the Albanian agricultural sector. In 2013, the Confucius Institute was founded at the University of Tirana where the wider public can learn Chinese (Hanban News, 2014).

## CONCLUSION

The starting point of this research was to strengthen China's presence in the European Union market, which is a consequence of its accelerated economic development and the need to continue to maintain high economic growth, satisfy the needs of the internal market for vital resources and new markets for the distribution of domestic products, all with the aim of improving the standards of its citizens and keeping the Communist Party of China in power. As a result, China has begun to strengthen relations with countries that aspire to become EU member countries, and with which it has traditionally had good relations since the period of the Cold War. In this regard, at the beginning of the research the author defined the history of relations between the Western Balkan countries and China bilaterally since 1949, and multilaterally within BRI. Since 2013, BRI has become China's most significant overseas initiative, serving to meet China's strategic goals. However, due to new international circumstances (strengthening of the Sino-US rivalry and COVID-19 pandemic) in next five years the Chinese government will allocate less funds for projects within BRI.

During the research, the factors that influence the Western Balkan countries' cooperation with China were identified. Summarizing them, it was concluded that most factors have a positive impact on the Western Balkan region's relations with China, and that only a minority of them have a negative impact. Thanks to the influence of positive factors, the Sino-Western Balkans cooperation has developed significantly since 2013, which can be seen in the comparative analysis. All Western Balkan countries have signed memorandums of cooperation with China within this initiative (North Macedonia (2014), Serbia (2015), Albania (2017), Bosnia and Herzegovina (2017), and Montenegro (2017)), and some of them have become members of the Asian Infrastructure Investment Bank, an institution established in 2015 to support the initiative (Serbia in 2015). Several dozen joint projects have been completed so far, many of which are of strategic importance to the Western Balkan countries. The value of these projects has almost exceeded the funds earmarked for this purpose in the CEE Investment Fund. However, there are still many more preferential loans than investments. These loans, although obtained on preferential terms, will have to be repaid by the Western Balkan countries, which is a limiting factor for cooperation during the expected crisis caused by the COVID-19 pandemic.

Having in mind the negative factor – the reduction of Chinese investments and loans abroad, it is clear that China will continue to invest and lend only to countries with which it has extremely good political relations and which are able to repay their debts. The research concluded that China has good political relations with all Western Balkan countries which have made significant progress since 2013, especially when it

comes to Serbia. Although they have a problem with rising public debts, some of them such as Serbia, Bosnia and Herzegovina and North Macedonia don't have problems with repaying debts to Chinese financial institutions. However, their public debts will increase as long as the crisis caused by the COVID-19 pandemic lasts, which will inevitably lead governments to prioritize spending and support for households and businesses over financing for BRI infrastructure and other projects. Montenegro and Albania have a high public debt because of tourism-dependent economy, which is likely to result in seeking refinancing loans. Also, one should keep in mind the pressure that will come from the EU regarding the Sino-Western Balkans cooperation, but it should not have much effect given the slowdown of the entire EU accession process and the need to diversify funding sources due to the COVID-19 pandemic.

Therefore, it can be concluded that the Western Balkan countries are in an ideal position to maintain good cooperation with China within the BRI. In this regard, one of the basic interests of the Western Balkan countries should be to increase exports to the Chinese market. Since these countries have poor export capacities, and individual export negotiations on products that are lacking in the Chinese market are proceeding very slowly and give barely visible results, they should impose themselves as partners in Beijing through political participation within BRI, and achieve political agreement. The Chinese government could draw up a list of products needed for the Chinese Market, where a place for the agricultural and animal products would be found. When it comes to exports, the focus could be on Western China, bearing in mind that there is already strong competition in eastern provinces from the companies from the US and Western Europe. In this regard, it is crucial that the Western Balkan countries work together to export as many products as possible to the large Chinese market. Also, Chinese leaders should show more understanding for the difficult position of the Western Balkan countries, primarily risking a slowdown in the European integration process to strengthen co-operation with China. They should show a willingness to put to the minimum limit for the entry of the Western Balkans companies and their products to the Chinese market. Therefore, it is the greatest responsibility of the leaders because they should show awareness, with their support and participation, that only together they can turn sources of power into successful smart power strategies – and thus achieve the individual interests and goals.

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## ОДНОСИ КИНЕ И ЗАПАДНОГ БАЛКАНА У ОКВИРУ МЕХАНИЗМА „ПОЈАС И ПУТ” ИНИЦИЈАТИВЕ УСРЕД СВЕТСКЕ БОРБЕ СА РАСТОМ КИНЕ

Сања Арџина

Влада Републике Србије, Београд, Република Србија

### Резиме

Невероватан економски развој Кине у последњих неколико деценија омогућио је овој земљи да постане прва трговинска сила и друга економија у свету (по номиналном БДП-у). Ипак, на европско тржиште Кина је успела да продере тек након Велике рецесије и кризе Еврозоне, првенствено захваљујући потреби европских држава за свежим капиталом, те се може рећи да је данас на европском тржишту присутна као трговински партнер, инвеститор и извор кредитирања. У складу са тим, крајем прве деценије 21. века почиње да јача сарадња између Кине и Западног Балкана. Односи су развијани на билатералном и мултилатералном нивоу, у оквиру „Један појас, један пут” иницијативе (иницијатива „Појас и пут” – БРИ), која је промовисана 2013. године и која је обухватила претходноосновани Механизам сарадње Кине и земаља Централне и Источне Европе (Механизам „17 + 1”). Иако је кинески председник Си Ђинпинг 2017. године БРИ назвао „пројектом века”, нове међународне околности изазване појачаним ривалством између САД и Кине и пандемијом вируса корона SARS-CoV-2 учиниле су да кинеско руководство на састанку Политбироа у мају 2020. године преиспита активности и финансирања у иностранству и нови, 14. по реду, Петогодишњи план усклади са променама које су се десиле у претходних пет година. У том смислу, одлучено је да у наредном периоду Кина фокус стави на двоструку циркулацију, која треба да омогући коришћење свих предности глобализације уз истовремено коришћење сопствених капацитета. То значи да ће Кина смањити број активности и инвестиција (и зајмова) у оквиру БРИ и средства преусмерити на инвестирање у домаће капацитете. Ауторка у чланку разматра односе Кине и Западног Балкана од 1949. године до 2013. године, када је започела примена БРИ, факторе који утичу на сарадњу Кине са државама Западног Балкана и анализира напредак сарадње након почетка примене БРИ у односу на претходни период. Да би доказала основну хипотезу да ће се сарадња између Кине и Западног Балкана у окви-

ру иницијативе „Појас и пут” и даље развијати у позитивном смеру, упркос утицају негативних фактора, а пре свега због добрих резултата постигнутих у оквиру иницијативе „Појас и пут” 2013. године, ауторка користи структурно-функционалну анализу, компаративну анализу, индукцију и дедукцију.



## LEGAL FRAMEWORK OF OCCUPATIONAL SAFETY AND HEALTH POLICY IN THREE SOUTH EASTERN COUNTRIES

**Aleksandra Ilić Petković\***

University of Niš, Faculty of Occupational Safety, Niš, Serbia

### Abstract

The legal framework for occupational safety and health is a key factor in effective policy implementation in this area at the local level. Employees in local self-government units perform tasks of immediate interest for the local population and, because of that, their workplace safety and health is an important issue. Given that there is not much research on the safety and health of employees in local self-government units in the countries of Southeast Europe, there is a need for the analysis of the protection provided by the applicable regulations. The conducted research shows that this category of employees is not specifically recognized either in the regulations on occupational safety and health or in the regulations on local self-government. It is desirable to improve the quality of legal protection which will contribute to the improvement of the workplace safety and health of these employees and will improve the quality of work in local self-governments.

**Key words:** employees, occupational safety and health, local self-government, legal framework, Southeast Europe.

## ПРАВНИ ОКВИР ПОЛИТИКЕ БЕЗБЕДНОСТИ И ЗДРАВЉА НА РАДУ У ТРИ ДРЖАВЕ ЈУГОИСТОЧНЕ ЕВРОПЕ

### Апстракт

Правни оквир безбедности и здравља на раду представља кључни фактор у ефикасној примени политике по том питању на локалном нивоу. Запослени у јединицама локалне самоуправе обављају послове од велике важности за локално становништво и због тога је њихова безбедност и здравље на раду важно питање. Како нема много истраживања о безбедности и здрављу на раду запослених у јединицама локалне самоуправе у државама Југоисточне Европе, постоји потреба за анализом њихове заштите кроз правну регулативу. Спроведено истраживање показује да ова категорија запослених није посебно препозната – ни у прописима о безбедности и

\* Аутор за кореспонденцију: Александра Илић Петковић, Универзитет у Нишу, Факултет заштите на раду, Чарнојевића 10А, 18000 Ниш, Србија, [aleksandra.ilic@znrfak.ni.ac.rs](mailto:aleksandra.ilic@znrfak.ni.ac.rs)

здрављу на раду, а ни у прописима о локалној самоуправи. Пожељно је унапредити квалитет правне заштите, што ће допринети унапређењу безбедности и здравља на раду ових запослених и унапређењу квалитета рада локалне самоуправе.

**Кључне речи:** запослени, безбедност и здравље на раду, локална самоуправа, прописи, Југоисточна Европа.

## INTRODUCTION

In modern times, employees are exposed to various types of risks to workplace safety and health, so the need for their prevention and promotion of safe and healthy working conditions is evident, since the maintenance of employees' health has an immeasurable effect on their productivity (Strategic Framework on Health and Safety at Work 2014-2020, 2014). Protection of the physical integrity of employees is considered an imperative of the modern system of occupational safety and health. The question is how to safeguard complete integrity of the employee – physical, mental, and moral (Neves & Do Ceu, 2018). The answer to this question seems to be more complex when taking into account the existence of a whole variety of jobs that employees can perform. It is important to ensure safe and healthy working conditions for employees who perform activities of vital interest for the functioning of the local community and local population at the level of local self-government units, which is relevant for human resource management at the local level (Perlman, 2016).

There is no unified understanding of the concepts of local self-government and occupational safety and health. Local self-government refers to public administration tasks performed by public institutions at the local level, which are different from the tasks performed at the state level (Pospíšil & Lebedzik, 2017). This refers to the right and opportunity for local authorities to regulate and manage a certain part of public affairs on the basis of their own responsibility, and in the interests of the local population, within the limits of the law (Ilić, 2013). It is a local management system aimed at harmonizing general and individual interests at the local level and protecting human rights and freedoms (Dimitrijević & Vučetić, 2011). The local self-government directly ensures the protection of citizens' vital interests and its activities should contribute to improving the quality of life of the local population, with limited material, human and other resources at its disposal (Gecíková & Papcunová, 2014).

Regarding occupational safety and health, many factors influence the understanding of this notion, such as the degree of development of socio-economic relations, dilemmas about the place and role of particular ideas in different sciences and disciplines, etc. (Anđelković, 2010). Labor law theoreticians have a specific view of workplace protection. General protection is a system of measures and activities that prevent or mitigate the harmful effects of working conditions and work processes on the safe-

ty, health and working capacity of all employees. Special protection provides additional protection for young people, employees who perform high-risk jobs, people with disabilities and health problems, pregnant women and women who have recently given birth (Kulić & Stojičić, 2016; Jovanović, 2015; Ivošević, 2007). Both types of protection refer to physical, mental and moral integrity (Marković, 1998).

There are several things to bear in mind when examining the position of employees in local self-government units in the context of occupational safety and health. Most importantly, as the activities carried out by the local self-government concern the vital interests of the local community, there is an indisputable need to pay special attention to the safety and health of the employees who perform these tasks. Taking into account the nature of the work they perform, one should not expect that their physical integrity is endangered, but the preservation of their mental and moral integrity would be a far greater challenge. The improved quality of legal protection of these employees gives a special contribution to the work of the public administration as a whole (Glennon at al, 2018). The implementation of health protection in different policies can involve the action at several levels of government, but it is true that the factors influencing the implementation of health protection in different policies at the local level are largely unexplored (Guglielmin at al, 2018). Since there is not much research on this topic, especially in the countries of Southeastern Europe, this paper will analyze the regulations on the labor status of employees in local self-government units and regulations on occupational safety and health in three countries of Southeast Europe – Serbia, Montenegro and Croatia. Until recently, these countries formed an integral part of one state, but today each is independent. Serbia and Montenegro are EU membership candidates, while Croatia is an EU member, so it is important to see how its regulations treat the health and safety of employees in local self-government units. In all three countries, any ideas that can contribute to the improvement of the occupational health and safety system in general and in local self-government units is of great importance because the social conditions in these countries are similar.

## *METHODS*

The normative method was used for collecting and processing the data in this paper. It was used for the analysis of constitutional documents in Serbia, Montenegro and Croatia in the parts pertaining to local self-government and occupational safety and health. This was followed by the analysis of the laws of the aforementioned countries and they were classified in two categories - laws regulating local self-government and labor status of the employees in local self-government and laws regulating occupational safety and health.

Finally, the results obtained for all three countries were compared. The authors first examined the results pertaining to constitutional documents, which was followed by the analysis of the laws in all three countries.

## *RESULTS*

### *The Republic of Serbia*

The significance of local self-government in the Republic of Serbia is observed in the fact that it is mentioned in the Constitution (2006) in various contexts, but the employees in local self-government units are not specifically recognized. The Law on Local Self-Government (2007) does not deal with persons' employment status in local self-government units and their workplace safety and health, but there are several provisions concerning the employment status in terms of the obligation or possibility of starting an employment relationship. The regulation that directly deals with the labor status of the employees in local self-government units in Serbia is the Law on Employees in Autonomous Provinces and Local Self-Government Units (2016). The law itself stipulates which categories of persons are considered employees and clearly determines the scope of persons to whom it applies. Employees are state officials, civil servants and state employees. This law thoroughly regulates the positions of officials and civil servants, while the rights and duties of state employees are regulated by general labor regulations, unless otherwise provided by this law.

Workplace safety and health of employees is one of the most important human rights and, in Serbia, it is guaranteed by the Constitution, which stipulates that everyone has the right to safe and healthy working conditions and necessary workplace safety (2006). The full meaning of constitutional proclamations is obtained by examining the Law on Occupational Safety and Health, which is the basic Serbian regulation in this field (2005). This law stipulates that occupational safety and health must be provided to all participants in the work process, but also to all persons currently in the working environment. As regards the occupational safety and health status of the employees in local self-government units, it can be noted that the Law on Occupational Safety and Health applies to these persons, i.e. there are no special provisions excluding them from its application or providing any special provisions that would apply to them.

### *The Republic of Montenegro*

There are several provisions in the Constitution of Montenegro pertaining to self-government (2007). It explicitly guarantees the right to local self-government and prescribes that the law should regulate the system of local self-government. When it comes to employees in local self-

government units, the Constitution recognizes the President of the Municipality as a person whom the Government can dismiss from office if he/she does not exercise his/her duties for a period longer than 6 months. The basic legal document regulating the system of local self-government in Montenegro is the Law on Local Self-Government (2017). This law defines local self-government units, regulates their status, jobs, property and bodies, but also identifies local officials, local civil servants and local employees and determines their status.

The Constitution of Montenegro stipulates that everyone shall have the right to work, free choice of occupation and employment, fair and humane working conditions, protection during unemployment, and adequate earnings. It also guarantees the right to limited working hours, paid holidays and occupational safety. The right to workplace safety is further regulated by the Law on Occupational Safety and Health (2014). The provisions of this law apply to all the employees in state bodies and state administration bodies, including the local self-government units, in the territory of Montenegro. Furthermore, they apply to all persons who are present at their place of employment in any work process on any legal basis. This law determines the scope of persons entitled to occupational safety and explicitly prescribes that its provisions pertain to the employees in local self-government units.

The Law on Local Self-Government does not recognize the right to workplace safety and health of local officials, local civil servants and local employees. It prescribes that the law governing the establishment of employment relationship in state bodies, the rights, obligations and responsibilities of civil servants and state employees, as well as general labor regulations, shall apply to the rights, obligations and responsibilities of these persons not regulated by this law. Therefore, this implies the application of the Labor Law of Montenegro (2008), which provides for workplace safety and health, as well as special workplace protection of women, young and disabled persons.

### *The Republic of Croatia*

The right to local self-government is regulated by the Constitution of the Republic of Croatia (2010). It proclaims that citizens shall be allowed to realize this right through their local representative bodies. The Constitution does not recognize employees in local self-government units in a special way, but this matter is managed by specific laws. The Law on Local and Regional Self-Government (2001) does not contain provisions on local civil servants, but contains several provisions on their training. The civil servants in local self-government are encouraged to continue their vocational training and development. The basic law pertaining to local civil servants in Croatia is the Law on Civil Servants and Employees in Local and Regional Self-Government (2008). This law defines the notion of civil servant and employee and thoroughly regulates their labor status. Fur-

thermore, in Croatia there is a special law regulating their salaries – the Law on the Salaries in Local and Regional Self-Government (2010).

Workplace safety and health is recognized in the Constitution of Croatia only indirectly. It stipulates that each person has the right to work, freedom of work, right to freely choose the occupation etc. The Constitution specifies that the longest working hours are determined by the law and that each employee shall have weekly rest and paid annual holiday, as well as the right to earnings. In the part referring to the rights of employed persons, there is a provision that guarantees the right to health protection to everyone, in accordance with the law. The right to workplace safety and health is regulated by the Occupational Safety Law (2014). This law is applied in all the activities in which employees work with an employer, with certain clearly defined exceptions (e.g. police jobs). Therefore, this law applies to the employees in Croatian local self-government units. They are not in any way exempt from its application.

### *DISCUSSION AND CONCLUSION*

The Constitution of Serbia does not deal with employees in local self-government units. Moreover, the Law on Local Self-Government deals neither with the regulation of the labor status of these persons, nor their occupational safety and health. Neither does the Law on Employees in Autonomous Provinces and Local Self-Government Units provide an overview of workplace safety and health, although it contains several provisions on this. The fact that the regulations on local self-government and employees in local self-government units do not recognize the issue of workplace safety and health of their employees highlights the necessity of analyzing the regulations pertaining to occupational safety and health. In Serbia the right to safe and healthy working conditions is guaranteed by the Constitution, which demonstrates a clear determination to ensure safe and healthy working conditions and necessary work protection in its broadest sense. This right is elaborated on in the Law on Occupational Safety and Health (2005). The law also applies to the employees in local self-government units. The right to occupational safety and health is guaranteed to them by the Law on Employees in Autonomous Provinces and Local Self-Government Units as well, since it stipulates that employees have the right to working conditions that will not endanger their life and health, the right to technical and other conditions necessary for work, the right to protection against threats, attacks and all other things that will endanger their occupational safety and health. At the request of an employee, the employer is obliged to take measures to protect his/her workplace safety and health and the employee has the right to protection against abuse at work. The protection of employees shall be provided by the employer. Therefore, employees are guaranteed both general and special protection at work. This

means that the right to protection of physical integrity from harmful effects of working conditions is guaranteed, as well as the right to protection of moral integrity from threats and attacks.

In the case of employees in local self-government units, the issue of their moral and mental protection is of special importance. It is clear that all these regulations guarantee the protection of physical integrity, but when one takes into account the nature of the tasks these persons perform, there is a much greater need for the preservation of their mental and moral integrity. The aforementioned regulations in Serbia only partially recognize this need. This issue is somewhat regulated by some other laws regarding the prohibition of discrimination, abuse at work, etc.

The Constitution of Montenegro and the Constitution of Serbia have a number of similar provisions pertaining to local self-government. Unlike the Constitution of Serbia, which does not acknowledge the employees in local self-government units, the Constitution of Montenegro contains a provision according to which the Government can dismiss the municipal president from office if he/she does not exercise his/her duties for a period longer than 6 months. A significant difference in the regulation of the labor status of employees in local self-government units between Serbia and Montenegro is that the Law on Local Self-Government in Montenegro regulates the labor status of these persons. In Serbia, this issue is regulated by a separate law – the Law on Employees in Autonomous Provinces and Local Self-Government Units. What these two countries have in common is that both contain legal documents that methodically regulate the system of local self-government and the persons who work in it.

With regard to occupational safety and health, in Serbia and Montenegro this right is guaranteed by constitutional documents almost identically. Neither the Constitution of Montenegro nor the Constitution of Serbia recognize the need for special protection of some categories of employees in local self-government. In Montenegro, the right to occupational safety is regulated by the Law on Occupational Safety and Health, which, like the Law on Occupational Safety and Health in Serbia, determines the scope of persons to whom it applies. However, there is one significant difference between the two laws. The Montenegrin law clearly stipulates that its provisions also apply to employees of local self-government units, while the Serbian Law on Occupational Safety and Health does not explicitly stipulate and prescribe this. The Law on Local Self-Government of Montenegro does not recognize the right to occupational safety and health of local officials, local civil servants and local employees, but implies the implementation of the Labor Law of Montenegro, which guarantees the safety and health of employees at work. This provision is almost identical in the Serbian Labor Law.

The Constitution of the Republic of Croatia guarantees the right to local self-government similarly to the constitutions of Montenegro and

Serbia. The Croatian Constitution has gone the farthest in regulating this right as it contains the largest number of provisions on this issue. Many of the issues regulated by laws in Serbia and Montenegro (e.g. financing and the revenues of local self-government units) are regulated by the Constitution in Croatia. The Constitution of Croatia does not recognize employees in local self-government units in a special way, nor do the constitutions of Serbia and Montenegro (except for the aforementioned provision of the Constitution of Montenegro authorizing the Government to dismiss the President of the Municipality in certain cases), but this matter is regulated by legal documents. The Law on Local and Regional Self-Government is a basic law governing local self-government, such as the Law on Local Self-Government in Serbia and the Law on Local Self-Government in Montenegro. These three laws do not regulate the labor status of employees in local self-government units, but the Croatian law regulates the professional development and training of local civil servants, which can lead to the conclusion that continuous education is recognized as particularly important for the local self-government. The basic law dealing with local civil servants in Croatia is the Law on Civil Servants and Employees in Local and Regional Self-Government. As can be seen, in Croatia and Serbia, the labor status of these persons is regulated by special laws, while in Montenegro this is contained in the Law on Local Self-Government. It can be noted that in the regulation of the labor status of local civil servants, Croatia went the longest way, as this country adopted a special law on the salaries of these persons.

Workplace safety and health are not explicitly prescribed by the Constitution of Croatia, unlike the Constitution of Serbia and the Constitution of Montenegro. The basic Croatian law regulating the issue of occupational safety is the Occupational Safety Law. This law applies to employees in the local self-government units of Croatia, because they are not exempt from its application. Therefore, Croatian employees in local self-government units are protected by this law the same as in Serbia and Montenegro. It is noticeable that employees in local self-government units are explicitly recognized only in the Law on Occupational Safety and Health of Montenegro, while in Serbia and Croatia, the laws on occupational safety and health apply to them without any special emphasis.

Bearing in mind that local self-government can be understood as the right and ability of local authorities to regulate and manage an extensive part of public affairs under their responsibility and in the interests of the local population, within the limits of the law (Demmke, 2005), it is not insignificant who will perform the jobs in local self-government units and how they will do it. This is why there are special laws on employees in local self-government units that regulate their working status in detail, different from the regulations that establish a general regime of labor relations. Values such as professionalism, efficiency, legality, transparency and the like, are expected from the employees in local self-government units, as well as the state



employees (European Charter of Local Self-government, 1985); therefore, it is necessary to provide safe working conditions. Given that there is not much research on the safety and health of employees of local self-government units in the countries of Southeastern Europe, the analysis of their legal protection provides an overview of the advantages and disadvantages of existing regulations (Table 1).

*Table 1. Overview of the regulations on occupational safety and health in local self-government units in Serbia, Montenegro and Croatia.*

State	Regulations on local self-government	Regulations on the employees in local self-government units	Regulations on occupational safety and health
Republic of Serbia	Law on Local Self-Government	Law on Employees in Autonomous Provinces and Local Self-Government Units	Law on Occupational Safety and Health
Republic of Montenegro	Law on Local Self-Government	Law on Local Self-Government	Law on Occupational Safety and Health
Republic of Croatia	Law on Local and Regional Self-Government	Law on Civil Servants and Employees in Local and Regional Self-Government Law on the Salaries in Local and Regional Self-Government	Occupational Safety Law

Based on the conducted research, we can draw a number of conclusions. In the legal systems of Serbia, Montenegro and Croatia, employees in local self-government units are recognized as a separate category of employees whose employment status varies to a certain extent from general labor relations. The constitutional documents of these countries do not deal with the position of employees in local self-government units, but this issue is regulated at the level of legal documents in all three cases. In Serbia, the employment status of these persons is regulated by the Law on Employees in Autonomous Provinces and Units of Local Self-Government, in Montenegro by the Law on Local Self-Government, and in Croatia by the Law on Civil Servants and Employees in Local and Regional Self-Government. All these laws are relatively new, which suggests that the legislator has only recently started to deal with the legal status of these persons.

In all three countries there are special laws that regulate the issue of occupational safety and health and none of these laws recognize employees in local self-government units in a special way, as a category that requires additional protection compared to the protection guaranteed to all other categories of employees. Moreover, the General Directive 89/391 (European Union (EU). Directive 89/391/EEC – OSH “Framework Directive”, 1989), although with some exceptions, does not recognize the

need for special protection of employees in local self-government units either. This applies to ILO regulations as well.

Although this issue is not specially treated, it can be elaborated on in the bylaws. It is necessary to pay attention to the protection of human integrity as a whole – physical, mental and moral. Employees in local self-government units should be especially protected in terms of their mental and moral integrity, because the understanding of psychosocial factors of occupational safety would contribute to reducing injuries, diseases and absence from work (Slany at al, 2014). Modern safety legislation in these countries should respond to the growing dangers of these two types of employee integrity, because work-related psychosocial risks can lead to deterioration of the mental health of employees, cardiovascular diseases and musculoskeletal organ disorders (EU-OSHA, 2017). The risk of workplace violence should also be mentioned, as it is becoming more and more frequent (Robbins, 2018). These are the dangers which should be specifically addressed in the safety legislation, because the legislative framework is essential for ensuring a high level of occupational safety. This would also contribute to reducing the costs of occupational injuries and professional diseases, which, for example in the European Union, amount to at least 476 billion euros a year (EU-OSHA, 2018).

Based on this discussion, it can be concluded that employees in local self-government units in Serbia, Montenegro and Croatia enjoy a special employment status, which is regulated by special legal documents different from the general labor relations. Unlike labor legislation, workplace safety and health of the employees in local self-government units of these countries is not regulated by special documents, nor are these persons recognized as special categories of employees in any way. Here there is room for improvement of the legislation in the form of bylaws, because these categories of employees could be treated in a special way, given the nature of the jobs they perform. This shall be an additional contribution to the modernization of local self-government (Copus & Steyvers, 2017) in keeping with the current trend of efficient use of human and material resources (Santrić Miličević at al., 2018), as well as to the much needed health promotion (Gecíková & Papcunová, 2014) in these countries. The improvement of legal regulations will result in better performance of employees (Lozina & Klarić, 2008) since the development of local self-government depends on social and personal factors (Arsenijević, Kastratović & Nešić, 2017), all of which will contribute to its better functioning.

Also, it can be concluded that the legal regulations in all three countries significantly follow the current trends in the legal framework of occupational safety and health, but little attention is paid to the specifics of certain categories of employees, such as local officials. With this in mind, there are some particular measures that the mentioned countries

could adopt in order to improve the safety and health of employees in local self-governments.

Improving the mechanism for controlling the application of occupational safety and health regulations is one of the measures that could be recommended. As in some countries local authorities and municipalities have powers to inspect, either using their own regulations or with delegation from central authorities (ILO, 2012), this could be a good example for the control of occupational safety and health regulations in local self-government units. Supervision over the implementation of occupational safety and health regulations is an important precondition for their consistent implementation. The introduction of local inspectors with such powers would significantly reduce the burden on national inspection bodies and increase efficiency in the implementation of regulations. In this way, more space would be given for preventive and advisory action of local inspectors.

Furthermore, as the prevention of occupational injuries and professional diseases is one of the requirements of the legislation of the mentioned countries, it is recommended to organize an occupational medicine service dedicated exclusively to employees in local self-government units. Apart from being preventive, such a service would have the role of providing health care to local self-government employees. As a large number of people are employed in the local self-government, this would reduce the pressure on other health institutions. Preventive action of such a service would reduce the risks to the mental health of employees, which is greater than the risk to their physical health, given the nature of the work they perform. However, as local officials frequently communicate with citizens, the risks to their physical integrity, such as work intensity, rapid changes in work procedures, conflict situations, and possible workplace violence, should not be neglected.

The conducted study could be a good basis for further research on specific risks for occupational safety and health of officials in general, both civil and local. Certain categories of civil servants, such as employees in penitentiaries, police or the army, are exposed to greater risks to their occupational safety and health. Therefore, the consideration and possible improvement of the legal framework on their occupational safety and health would be important for enhancing the protection of these categories of employees.

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## **ПРАВНИ ОКВИР ПОЛИТИКЕ БЕЗБЕДНОСТИ И ЗДРАВЉА НА РАДУ У ТРИ ДРЖАВЕ ЈУГОИСТОЧНЕ ЕВРОПЕ**

**Александра Илић Петковић**

Универзитет у Нишу, Факултет заштите на раду, Ниш, Србија

### **Резиме**

Безбедност и здравље запослених представља један од приоритетних изазова савременог друштва. Правни оквир безбедности и здравља на раду је кључни фактор у ефикасној примени политике по том питању на свим нивоима, почев од међународног, преко државног, па све до локалног нивоа. Запослени у јединицама локалне самоуправе обављају послове који су од велике важности за локално становништво и од виталног интереса за функционисање једне локалне заједнице. Из тог разлога, веома је важно питање безбедности и здравља на раду лица која обављају те послове. У литератури готово да не постоји истраживање које се односи на безбедност и здравље на раду запослених у јединицама локалне самоуправе уопште, а нарочито таквих истраживања нема у државама Југоисточне Европе. Због тога је спроведено ово истраживање и указано је на то да постоји потреба за анализом њихове заштите кроз правну регулативу. Спроведено истраживање показује да ова категорија запослених није ни на који посебан начин препозната – ни у прописима о безбедности и здрављу на раду, а ни у прописима о локалној самоуправи. Пожељно је унапредити квалитет правне заштите безбедности и здравља на раду запослених у јединицама локалне самоуправе, јер ће то на крају допринети и унапређењу квалитета рада јединица локалне самоуправе.

## A DOCTRINAL JUSTIFICATION OF THE INSTITUTION OF COMPULSORY SHARE IN MODERN LEGISLATURE

Novak Krstić\*

University of Niš, Faculty of Law, Niš, Serbia

### Abstract

In terms of content, compulsory share is the most efficient and effective testation restriction. In the European Continental legal systems, this institution allows a testator's family members to inherit a legally defined portion of the inheritance against the testator's will. In modern legal theory and practice, the question is increasingly raised regarding the justifiability of guaranteeing the compulsory share. Views advocating a comprehensive restriction, even an outright abolition, of this institution are gaining prominence, arguing as they are for each individual to thus be able to fully exercise their property rights as they see fit. Although this has been the subject of fierce debate in legal circles recently, one must bear in mind that the compulsory share is a very important inheritance law institution with multiple functions, and that it should not be called into question in Europe. Therefore, the present author outlines the classical theories justifying the existence of the institution of compulsory share, analyses their basic tenets and ideas, and goes on to put forward his observations regarding which arguments can be used to defend regulating compulsory inheritance in modern legal systems.

**Key words:** compulsory share, testator, will, theories of compulsory share justifiability.

## ДОКТРИНАРНО ОПРАВДАЊЕ ПОСТОЈАЊА УСТАНОВЕ НУЖНОГ ДЕЛА У САВРЕМЕНОЈ ЛЕГИСЛАТУРИ

### Апстракт

Нужни део је садржински најефикасније и најделотворније ограничење слободe завештајног располагања. Овом установом у правима европско-континенталног правног круга обезбеђује се најближим члановима оставиоачеве породице да и супротно његовој вољи наследе законом дефинисани део заоставштине. У савременој правној теорији и пракси све се чешће поставља питање оправданости гарантовања права на нужни део. Све су гласнији ставови за потребом свеобухватне рестрикције,

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\* Аутор за кореспонденцију: Новак Крстић, Универзитет у Нишу, Правни факултет, Трг краља Александра 11, 18105 Ниш, Србија, [novakkrstic@yahoo.com](mailto:novakkrstic@yahoo.com)

чак и његовим потпуним укидањем, како би се сваком појединцу омогућило да последњом изјавом воље располаже својим имовинским правима у потпуности према сопственом нахођењу. Премда се последњих година о овоме воде жестоке расправе у правничким круговима, мора се имати у виду да је нужни део веома значајан институт наследног права, чија је функција вишеструка, те да не треба доводити у питање његово егзистирање на европском континенту. У том смислу, аутор у раду указује на класичне теорије којима се оправдава постојање установе нужног дела, анализира њихове основне поставке и идеје, а потом износи и своја запажања о томе којим се аргументима данас може бранити регулисање нужног наслеђивања у савременим законодавствима..

**Кључне речи:** нужни део, оставилац, завештање, теорије о оправдању нужног дела.

### INTRODUCTORY REMARKS

Freedom of testation is one of the basic principles of succession law and the first principle of inheritance by will (Langbein, 1975, p. 491). Setting limits to the freedom of testation is one of the central questions of modern law of succession and the focus of codifiers in developing large-scale codifications. The freedom of testation is an expression of the autonomy of will and a consequence of the view that only the bearer of property rights, competent to make a will, is authorized to dispose of said rights through a unilateral legal act of mortis causa as he/she sees fit. Traditionally, the freedom of testation is understood as an assumption of the property right with important functions, such as reinforcing parental authority, maintaining sound relationships amongst the children and the family in general, in order to avoid the breaking up or disintegration of the family (Parra, 2009, 497). This freedom contributes to a greater need for producing and saving more wealth (Hirsch, 2011, p. 2187), as well as further investments and increased productivity (Kelly, 2013, p. 1127), so that the property gained would be left to the desired beneficiaries in a last will, and is therefore an instrument ensuring the maintenance and growth of family wealth. It also affects familial relationships by enabling parental control over children and encouraging children to care for their parents (Kelly, 2013, pp. 1127–1128), in order not to be disinherited.

Nonetheless, the freedom of the testator to leave his/her property to the persons he/she sees as the fittest, most valuable, or simply dearest, has never been unrestricted. The need of the society to protect in some degree the property interests of the persons closest to the testator goes beyond the interest of ensuring the full freedom of testation (Antić, 1983, p. 19) and represents *"the exact opposite of the full freedom of testation"* (Marković, 1955, p. 113). The compulsory share is a portion of inheritance, expressed in value terms, which must be transferred to the legally defined group of the testator's family members, if they so request. The institution of compulsory share originates from the ancient Roman law at the time of the Republic, and is recog-



nized by all the legal systems which continue the tradition of the European Continental law and are part of its family; these legal systems regulate the institution of compulsory share via the rules of cogent legal nature, and therefore their legal effect cannot be annulled by the testator's will.

The compulsory share has always occupied the space at the boundary between the freedom of testation and the principle of family inheritance. From a theoretical viewpoint, this institution simultaneously realizes the constitutionally guaranteed succession right and provides family protection (Kipp, Coing, 1990, p. 51). Still, just like the very institution of succession, the institution of compulsory share has always been subjected to numerous critical assessments, but in a comparatively greater degree. Calls to abolish, or at least modify, the institution of compulsory share have been more and more frequent in the area of the succession right theory, giving the individual more freedom to dispose of his/her property rights (more: Cámara Lapuente, 2011, pp. 283–289). It is pointed out that it runs contrary to the freedom of the individual to autonomously dispose of the assets in his/her possession; that the duty of supporting children expires after a certain number of years; that it should not be permanent; as well as that the assets gained belong to a single person and not the entire family, and that therefore they do not have to be transferred to the family members after the death of the owner (Lamarca i Marquès, 2014, p. 267). It is often said that guaranteeing the absolute freedom of testation encourages people to work, produce and acquire more assets, as they know that they have an unrestricted possibility of leaving them to persons of their own choosing (Hirsch, 2011, p. 2187). In German theory, opponents of this institution underline the danger to the operation of big companies due to the distribution of property among inheritors. Specifically, the compulsory share jeopardizes companies because when it is paid out in money, the debtor often has to sell a part of the company in order to cover the value of the compulsory share (Schöpflin, 2006, pp. 5, 8). It is for these reasons that in many European legal systems a trend can be identified of narrowing down the number of compulsory inheritors, setting the compulsory share in money, as well as broadening the reasons for the exclusion of compulsory inheritors (Pintens, 2003, p. 423). Italy has seen the initiative to abolish the compulsory share,<sup>1</sup> and there are views among European legal experts that the work on unifying European civil law will be geared towards its abolition (Sonnekus, 2005, pp. 83–84).

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<sup>1</sup> See the document: Disegno di legge No. 576, dated 16 May 2008, available on the following link: <http://www.senato.it/leg/17/BGT/Schede/Ddliter/40632.htm>. The Italian parliament did not take this matter under consideration, and the doctrine deemed it very radical, pointing out that protecting the freedom of testation does not require a full derogation of compulsory inheritance (Dossetti, 2009, p. 35).

Today, when the institution of compulsory share is subjected to harsh criticism and contested to the point of calling into question its very existence in some legal systems, it is necessary to consider afresh the question of whether this institution deserves the place it has in modern legal systems and what its future holds. Therefore, this paper will point out the most important theoretical perspectives justifying the existence of the institution of compulsory share and outline a specific view on the status of this institution *de lege ferenda*, as well as on possible approaches to modifying it.

### *THE LEGAL AND PHILOSOPHICAL VIEWS ON THE JUSTIFICATION OF THE INSTITUTION OF COMPULSORY SHARE*

As the institution of compulsory share has always been criticised and contested, it was necessary to formulate a valid justification for its existence in modern legal systems, which place more and more emphasis on the freedom of the individual and develop the concept of individualism and liberalization. Various theories have been put forward, based on diverse philosophical approaches, attempting to identify the foundations of the compulsory share. Some of the most important ones are discussed below.

#### *The Tacit Fideicommissum Theory*

Fideicommissum is an institution originating from the ancient Roman law and is related to the legal acts of *mortis causa*. Initially, it was a moral institution and not a legal one, but it was subsequently articulated legally for practical reasons (Vujović, 2018, p. 87). *Via fideicommissum quod familiae relinquitur*, the testator tried to ensure that a family house remained within the family and to prohibit its alienation. Hence, fideicommissum is often characterized as an estate that becomes inalienable for all future generations as per the will of its owner, and which must be transferred to family members.<sup>2</sup>

The tacit fideicommissum theory gives special emphasis to the family dimension of inheritance. According to this doctrinal viewpoint, the compulsory share is seen as an expression of the need to keep at least a portion of the ancestors' property within the family for future generations. Each person is obliged to ensure the welfare of his or her descendants.

Each individual is one of the stones in the family foundation – tied to a long line of ancestors, with possible ties to an indefinite number of descendants. *"He is but a link in a chain whose beginning is no longer known and*

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<sup>2</sup> But, fideicommissum did not have an absolute effect. It only constrained the family members indicated in the will, and not other relatives, so the generations that followed could alienate said property (Hillner, 2003, p. 134).

*whose end may never be known*" (Pantelić, 1937, p. 348). The goods that he/she possesses are a result of work, accumulation and saving on the part of known and unknown ancestors, who contributed shares – impossible to determine – to the family wealth (Lair, 1865, pp. 212–213). It is in this sense that the current holder of an economic good is only its keeper, and has no right to break the chain of inheritance or to alienate the good of his/her own accord by testation, as in this way he/she would go against the will of the ancestors. Even when wealth is not a consequence of economic accumulation over generations, and instead only of the work of its owner, the proponents of this theory stand by their view, claiming that this very individual result comes from the ability passed on from ancestors and from education acquired within the family (Lair, 1865, p. 213).

The tacit fideicommissum theory has many shortcomings. One shortcoming that is often pointed out is that the basis for the compulsory share is found in a legal phenomenon which, historically speaking, did not play a big role in everyday legal activities, except in the period of feudalism (Antić, 1983, p. 235), while most of modern legal systems prohibit or restrict it. Another major shortcoming lies in the fact that in fideicommissum the restriction of testation relates only to inherited property, which as a rule is a specific immovable asset, and not non-inherited property. There is no such separation in the compulsory share.

### *The Family Property Theory*

As a philosophical view providing a justification for the compulsory share, the family property theory in some sense builds upon the assumptions of the tacit fideicommissum theory. In this theoretical standpoint, the justification for the legal prescription of retaining a portion of inheritance in the family is found in the family (co-)property as a form of property which preceded individual, private property across all societies.

The origin of the institution of compulsory share is found in family property, which ensures that a portion of inheritance remains within the family. The advocates of this view point out that, historically speaking, in the past family assets could not be alienated without the permission of other family members, as property is not a consequence of labour and production of a single person but an entire generational chain, and that therefore each individual owes his/her existence and welfare to the entire family (Antić, 1983, p. 236). The proponents of this approach find additional arguments in the principles of family ethics: by the very nature of things, it is necessary for the family property to remain available to family members in order, among other things, to provide for each of its members. At the same time, it is pointed out that children are their parents' natural heirs and that a system should be established which would ensure equality among children as well as prevent parents from unjustly discriminating against them, which may result in family squabbles, disagreements, and envy (Parra, 2009, p. 497).

The family property theory is based on an institution that has long since disappeared from modern law. It is therefore very difficult to justify the positive legal norms of the compulsory share by an institution that held sway in ancient legal systems. When individual property replaced collective property, disposal of assets is no longer subject to such restrictions. This is why this doctrinal view cannot justify the existence of the compulsory share today.

### *The Support (Alimony) Theory*

Family law prescribes the persons which the legal obligation of support relates to, as well as the conditions for providing support (Batie, 1866, p. 103). Further, the provisions regulating the obligation of ancestors to provide support for their descendants (above all the obligation of parents to provide support for their children), as well as the obligation of descendants to provide support for their ancestors, are especially important. The legal obligation of support stops with the death of the support provider and is not transferred to his/her heirs. According to the views of the alimony theory advocates, the compulsory share aims to ensure and continue support from the inherited property for the persons that a testator had the obligation to support in his/her lifetime. Its purpose is to ensure a continued existence of the obligation of support after the debtor's death, which corresponds to the natural obligation existing and linking ancestors and descendants and vice versa.

This theory has the greatest number of proponents in the domestic legal doctrine. After the Second World War, at a time when rules for compulsory inheritance were articulated, legal experts pointed out that the compulsory share no longer serves to maintain family property but rather to provide support for junior descendants and incapacitated persons (Konstantinović, 1947, p. 339); they also pointed out that the justification for the compulsory share lies in the duty of support and care that the testator had or could have had while alive (Blagojević, 1969, pp. 180–181). The compulsory share prevents the testator from freely disposing of his/her property rights of *mortis causa* to the detriment of the persons he/she is obligated to support and provide material assistance to while alive (Šinkovec, & Tratar, 2005, 108). Younger legal writers take the view that, although it is difficult to find a single basis for the compulsory share for all times and territories, the alimony theory, with its advance for future support, is still the most realistic justification for the compulsory share (Stojanović, 2011, p. 142), if modified in a manner that avoids the shortcomings of a pure alimony theory. The modification refers to the compulsory share being provided in money and not *in natura*, with exceptions stemming from the rights of inheritors who lived or worked in a community with the testator (Antić, 2009, p. 191).

In foreign legal theory, however, the support theory has few proponents. The shortcomings of this theory regarding the justification for

the compulsory share are being increasingly pointed out. Its premises are said to be antiquated, as the living conditions are different now than they were in the past, and children are no longer as dependent on their parents as before (Csehi, 2011, p. 179). It is also said that children often contribute to the growth of family property, and that even if they do not work, they certainly can contribute, so that parent-child transfers go both ways (Lamarca i Marquès, 2014, p. 274). The alimony theory cannot explain why the group of compulsory inheritors does not match the group of persons with the right of legal support recognized by legal systems. In addition, many compulsory inheritors' right to the compulsory share is recognized even though they are financially secure and do not need to be supported. Lastly, unlike support, the compulsory share is not paid out in instalments, nor is it sufficient to meet the basic needs of a compulsory inheritor; rather, it is paid in a set one-off sum or in the form of a legally prescribed share in inherited property.

### *The Family Solidarity Theory*

The family solidarity theory has many proponents in both foreign and domestic legal doctrines. The spiritual and material solidarity among family members as one of the basic family links has survived the disappearance of family property and is the likely reason for the society's insistence upon providing family members with a portion of the inheritance despite the testator's will. Intergenerational solidarity is traditionally seen by foreign legal writers as the foundation of the institution of compulsory share (Lamarca i Marquès, 2014, pp. 273–274; Pintens, 2011, p. 12). It implies that individual inheritors must not be sidestepped in the distribution of inheritance. This results from the fact that no one is born alone and dies alone, and that generational continuity ought also to be seen in terms of the compulsory share (Lamarca i Marquès, 2014, p. 274). It is pointed out that family solidarity should exist not only while a family member is alive but also after their death.<sup>3</sup>

The basic function of the compulsory share is to provide support, but it is observed that nowadays children often inherit at a point when they are already financially secure, so that the compulsory share is no

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<sup>3</sup> Considering the nature of the right of children to the compulsory share, the German Constitutional Court passed the decision on 19 April 2005 to the effect that the right of children to the compulsory share is a constitutionally guaranteed right based upon universal solidarity among family members – a psychological as much as an economic link. Therefore, the function of the compulsory share is to maintain the psychological and economic unity of the family, independently of the economic needs of the testator's children (BVerfG NJW 2005, 1561 – BVerfG v. 19.4.2005 – 1 BvR 1644/00 und 1 BvR 188/03). The decision is available on the following link: [http://lorenz.userweb.mwn.de/urteile/1bvr1644\\_00.htm](http://lorenz.userweb.mwn.de/urteile/1bvr1644_00.htm).

longer a means to provide financial security, but rather to improve the living standard. Therefore, the function of the compulsory share is no longer understood as extending the obligation of parents to support their children. Parents end their duty by providing their children with the opportunities for education (Pintens, 2011, pp. 12–13).

Alongside the importance of the alimony theory, the domestic legal scholarship underscores the role of family solidarity as a foundation of the institution of compulsory share, in particular as it must be provided forthwith, without any restrictions. If in his/her mortis causa disposals the testator side-steps his/her family members, such disposals are legally ineffective (Marković, 1981, p. 184). Analysing the postulates of the other philosophical views justifying the compulsory share, Pantelić identifies family solidarity in each one of them. He defines it as the "*unconscious and conscious interdependence of family members and their linked interests, connecting them in time and in space*" (Pantelić, 1937, p. 347). He sees the compulsory share as a social sanction of mutual rights and duties of the testator and the persons closest to him/her, primarily the duties of the testator towards his/her closest family, stemming from family solidarity (Pantelić, 1937, p. 348).

Solidarity among family members strengthens the family's economic aspects as well, and family certainly is an important economic factor in the society. Family members contribute to the production of material and non-material goods. The cooperation between family members increases the wealth of the family as well as that of each individual. This is why after the death of a family member the closest relatives should participate in the distribution of property that the family member had accumulated (Schöpflin, 2006, p. 9). As it ensures that many family members obtain a portion of the testator's property, the right to the compulsory share stimulates economic cooperation within the family as well as interpersonal cooperation.

The family solidarity theory has its shortcomings as well. The biggest one lies in the fact that one legal institution is justified by means of a higher, non-legal concept, whose content is difficult to define. The reasons for the existence and survival of a legal institution, it is claimed, should be sought in the legal domain, among other legal institutions (Antić, 1983, p. 241). In addition, what is also questionable is the quantum of solidarity among today's family members, with whom the egotistical, property-related interests prevail, often destroying the substrate of this concept.

### *The Theory of the Threefold Basis of the Compulsory Share*

As all of the views above are one-sided and for the most part interpret from one vantage point such a complex institution as the compulsory share, Gustave Boissanade formulated the so-called theory of the threefold basis of the compulsory share. He tried to locate the basis of the compulsory share in the symbiosis of the theory of tacit fideicommissum, alimony and family property, indicating the advantages of these theories and combining their

basic principles, which have already been discussed in the present paper (more: Boissonade, 1873, pp. 539–545).

The ideas behind the theory of the threefold legal basis providing justification for the institution of the compulsory share are not acceptable. This view suffers from the entire gamut of the shortcomings of each of the theories that it is based upon.

*ON THE IMPORTANCE OF THE INSTITUTION OF COMPULSORY  
SHARE TODAY AND THE REASONS FOR ITS NORMATIVE  
EXISTENCE DE LEGE FERENDA*

Succession law is conservative in character and burdened with tradition (Vaquer Aloy, 2011, p. 91), and the institution of compulsory share has for centuries been deeply rooted in the rights belonging to the European Continental family of law. In accordance with the social notion of justice, it is disallowed in the European legal culture for the testator's closest family to be left without a single portion of the inheritance (Kipp & Coing, 1990, pp. 51–53).

The manner in which each state regulates it is conditioned by numerous social determinants: the historical moment that a society is in, its social and cultural specificities (Foqué & Verbeke, 2009, p. 204), the political, legal, philosophical, sociological, and ethical views on the importance of family, familial relations and values, the role of the individual in the society and his/her freedoms, etc. Therefore, the legislation surrounding compulsory inheritance reflects the legal and political ideas of the legislator pertaining to highly complex issues from various social and legal domains. The legal provisions governing the institution of compulsory share are designed in such a way as to reconcile two opposed requirements: 1. To limit the freedom of testation, more broadly the free disposals on the part of the testator which might impair the material position of the persons closest to him/her – the compulsory inheritors, which is the primary goal; and 2. To ensure that the limitations are devised in such a way as for the freedom of testation and all other unencumbered disposals not to be overly narrow, as well as for the legal security of the beneficiaries of charitable legal transactions not to be impaired (Krstić, 2012, p. 442).

All of the above indicates that the institution of compulsory share has a future. The provisions regarding the group of compulsory inheritors and the manner in which the compulsory share is implemented may vary between states; legal reforms may narrow down the group of persons whose right to the compulsory share is recognized, or the size of the compulsory share; they may prescribe additional conditions for the exercise of this right, and find new ways of expanding the freedom of testa-

tion.<sup>4</sup> However, calling into question the existence of this institution, and even thoroughly redefining the basis it has had for centuries, does not appear realistic.<sup>5</sup> Individual attempts of some theorists and practitioners cannot shake the foundations of this institution in the European legal systems. The arguments justifying the regulation of compulsory inheritance are sufficiently solid not to jeopardize its existence.

The full complexity of this institution is reflected, among other things, in the theoretical postulates and philosophical views discussed above, which locate the reason for the existence of the institution of compulsory share in the variegated legal and non-legal institutions and concepts. Still, the starting assumptions of all these theories are questionable, and many objections to them are raised in legal doctrines, pointing out their shortcomings.

In light of the above, it can be concluded that no philosophical view explains in full the *ratio* of an institution as complex as the compulsory share. What all of these theories have in common, which is an advantage that they have, is that they address the family law component of the institution of compulsory share. Family is the basis of society, not the individual, and goods are produced within the family, so that the compulsory share is an expression of co-existence within the family, which is based not only on give-and-take, but rather represents the totality of the complex relations between its members. The familial character of inheritance is the reason why close family are provided with more than the right to support, and this is why after the death of a family member a portion of the inheritance should go to family members.

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<sup>4</sup> One of the basic characteristics of the compulsory share is that it is fixed for each compulsory inheritor in advance (Marković, 1981, p. 185; Foqué & Verbeke, 2009, p. 210), which leaves no room for adapting the size of the compulsory share to the circumstances, e.g. the needs of the compulsory inheritors or their contribution to the growth of the inheritance value. This is why it may be considered unjustified for someone who is financially secure and who has not contributed to the growth of the inheritance to receive a portion of it independently of the testator's will, and even directly against it. Ideas have been put forward for reforms of compulsory inheritance which would ensure that the size of the compulsory share is not preset; rather, the court would decide for each individual case based on the needs of the closest family members (Delgado Echeverría, 2006, p. 128). For this reason, some legal systems allow the testator to reduce the compulsory share of the inheritors that have become alienated from him/her over the course of their lifetime (more: Foqué & Verbeke, 2009, p. 214). This contributes to the flexibility of this institution, as against its *per definitionem* rigidity.

<sup>5</sup> Due to the fact that an increasing number of states only recognize the right of the compulsory inheritors to request the monetary value of the compulsory share, as they are disallowed from participating in the distribution of the inheritance *in natura*, some authors are of the opinion that the compulsory share persists, but in a modified and weakened form (Vaquer Aloy, 2011, p. 93). As paying the value of the compulsory share may be a great burden for the debtor, some legal systems envisage the possibility of deferred payment or payment in instalments of the value of the compulsory share (more: Softić Kadenić, 2011, pp. 37–38).



Therefore, the compulsory share is in a sense an instrument through which the state intervenes among family members in order for the family to be able to fulfil its basic social functions. It prevents an excessive removal of property from the bounds of the persons closest to the testator, thus providing for these persons, and a more equitable distribution of property is ensured among those that have often, in their many different activities, brought a part of themselves to the property accumulated by the testator over the course of his/her lifetime (although this may not be the case). This institution protects the property interests of the individuals related to the testator through blood, adoptive, or partnership ties, whose effect in terms of the succession laws is recognized by legal systems.

The legislator which sets the limits to the freedom of charitable disposals assesses the degree of protection. The set limits are to an extent arbitrary, but they should be an expression of the dominant social views on the importance of facts relevant to the articulation of the rules of compulsory inheritance; they should reflect life, and not find their justification solely in a doctrinal view or a theoretical construct. Legal solutions can be based on certain theoretical postulates or philosophical ideas, but they should not be the legislator's only defence line, or an excuse for defending the designed legal solution. Although the institution of compulsory share bears the marks of conservatism and relative duration that does not imply that it is immutable. Law is a living thing, it follows the metamorphosis of the society and adapts to specific flows of life, which it then shapes in a socially acceptable way. The same goes for the norms of compulsory inheritance, which ought to be an expression of current social views on the importance of family values and should reflect them faithfully.

### *CONCLUSION*

In the author's opinion, the basis for a legal institution need not be found in legal concepts, institutions or rules. Numerous legal institutions have arisen precisely as an expression of philosophical views on certain social phenomena and the need for their shaping by legal norms.

The postulates of the alimony theory can be a starting point for explaining the existence of the compulsory share, but in and of itself it is not sufficient for justifying this institution. The compulsory share often does not depend on the needs of compulsory inheritors; rather, they are guaranteed the compulsory share irrespective of their personal assets; furthermore, parents invest significant resources over the course of their lifetimes in schooling, education, and general well-being of their children. Even today, when the links between family members are weakening, when alienation is indisputable, and a sense of belonging to the family dissipating, when the general material situation is better and the opportunities for able-bodied family members to make a profit greater, family solidarity remains a value in its own right.

Therefore, the rules of compulsory inheritance should be formulated based on family solidarity, with the aim of providing existential security to the persons closest to the testator; above all, however they must be built on the foundations of the dominant modern understanding of which persons are to be considered especially close to the testator – so close that it would be justified to restrict the freedom of testation in the interests of these persons. The author believes that the combination of the above is where the *ratio legis* of the compulsory share should be sought.

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## ДОКТРИНАРНО ОПРАВДАЊЕ ПОСТОЈАЊА УСТАНОВЕ НУЖНОГ ДЕЛА У САВРЕМЕНОЈ ЛЕГИСЛАТУРИ

**Новак Крстић**

Универзитет у Нишу, Правни факултет, Ниш, Република Србија

### Резиме

Слобода завештања један је од темељних принципа наследног права, а установа нужног дела њено садржински најефикасније и најделотворније ограничење. У теорији наследног права све су снажнији позиви да се установа нужног дела укине, или бар модификује, а појединцу омогући шира слобода располагања својим имовинским правима. Стога је важно преиспитати основе на којима овај институт почива и размотрити да ли је његова егзистенција неопходна у савременом праву. Уколико јесте, којим аргументима се одржавање ове установе може оправдати.

У раду су најпре анализирани поставке класичних теорија којима се оправдава постојање установе нужног дела: теорије прећутног фидеикомиса, теорије породичне својине, теорије издржавања (алиментациона теорија), теорије породичне солидарности и теорије троструког правног основа, које разлог егзистенције установе нужног дела налазе у разноврсним правним и ванправним институтима и појмовима. Потом су изнета запажања о томе којим се аргументима данас може оправдати нормирање нужног наслеђивања у савременим правима.

У раду је изнет став да се основ једног правног института не мора увек налазити у правним појмовима, институтима, регулама. Бројне правне установе управо су и настале као израз филозофских погледа на одређене друштвене феномене и потребе за њиховим уобличавањем путем правних норми.

Постулати алиментационе теорије, која је заступљена међу бројним правним писцима и која основ нужног дела налази у потреби обезбеђења егзистенције најближим члановима породице из заоставштине оставиоца, могу бити полазна основа за објашњење постојања нужног дела, али она сама по себи никако није довољна да се оправда ова установа. Нужни део често не зависи од потреба нужних наследника, већ им се гарантује, без обзира на њихове имовинске прилике. И данас, када су споне међу члановима породице све слабије, када је отуђење несумњиво присутно, а осећај за припадност породици све слабији, и када су могућности за стицање зараде радно способних чланова породице веће, породична солидарност остаје вредност сама по себи. Стога, правила нужног наслеђивања треба да буду формулисана на бази породичне солидарности, са циљем егзистенцијалне заштите оставиоцу најближих лица – толико блиских да би било оправдано у интересу тих лица ограничити слободу оставиоца да својим добрима располаже како му је воља. У симбиози наведеног треба тражити *ratio legis* нужног дела.

**ДРУШТВО, КУЛТУРА, МЕДИЈИ**  
**SOCIETY, CULTURE, MEDIA**



## GENDER AND IDEOLOGY: WOMEN ON POSTAGE STAMPS IN SERBIA: 2006-2018

Margareta Bašaragin<sup>1</sup>, Svenka Savić<sup>2\*</sup>

<sup>1</sup>Women Studies and Research, Novi Sad, Serbia

<sup>2</sup>University of Novi Sad, Faculty of Philosophy, Novi Sad, Serbia

### Abstract

In 2000 certain democratic changes happened in Serbia. They instilled hopes that everyday life will be more democratic in every segment, especially when gender equality is concerned (equality for the different, that is, women). The degree to which a society is democratic could be measured in different ways. One of them is the presence of visuals (drawings, etc.) or presence of any other form of material culture.

The aim of this paper is to examine the degree of democratic changes in multinational, multi-confessional and multilingual Serbia during the last decade as it relates to the absence of linguistic codes, and using postage stamps to depict women (2006-2018). The corpus consists of all the postage stamps printed during the period, but only those depicting women were analysed. The analysis of the text on postage stamps opens up a theoretical question "What is text"?

We here introduce the criterion of 'implied knowledge' as a measure for the understanding of the meaning of text on a stamp, more accurately, as a measure of the presence of an implicit discrimination towards notable women.

The results reveal the following: 1. there are only several women who got the privilege to be presented on a postage stamp in this period; 2. all of them originate from the Serbian culture and none from other national communities. This clearly shows that the ideological decision is in question.

**Key words:** gender, ideology, postage stamps, Serbia, women.

## РОД И ИДЕОЛОГИЈА: ЖЕНЕ НА ПОШТАНСКИМ МАРКАМА У СРБИЈИ: 2006–2018.

### Апстракт

Године 2000. дошло је до демократских промена у Србији. Оне су донеле наду да ће свакодневни живот бити у сваком сегменту демократичнији, нарочито када се ради о равноправности (равноправности за различите, тј. жене). На разне начине мо-

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\* Аутор за кореспонденцију: Маргарета Башарагин, Женске студије и истраживања, Булевар војводе Степе 107, 21000 Нови Сад, Србија, [margareta.basaragin@gmail.com](mailto:margareta.basaragin@gmail.com)

жемо мерити до ког степена је неко друштво демократско. Један од њих је присутност визуелних елемената или неког другог облика материјалне културе.

Циљ овог рада је да испитамо степен демократских промена у вишенационалној, вишеконфесионалној и вишејезичној Србији током последње декаде у одсуству језичког знака, а на примеру штампаних поштанских марака са ликом жена (2006–2018). Корпус се састоји од марака штампаних у том периоду, али смо анализирале само оне са ликом жена. Анализа текста на марци отвара теоријско питање „Шта је текст?“. Ту отварамо критеријум подразумеваног знања као мерила за разумевање значења текста на марци, тачније, као мерила за присуство имплицитне дискриминације према знаменитим женама.

Резултати откривају следеће: 1. само неколико жена добило је привилегију да буде приказано на маркама у овом периоду; 2. све оне припадају српској култури, а ниједна другим националним заједницама. Ово нам јасно предочава да је у питању идеолошки критеријум.

**Кључне речи:** идеологија, поштанске марке, род, Србија, жене.

### INTRODUCTIONS

Postage stamps were introduced as a monetary value for shipment, primarily of letters, but it became clear that they were not isolated from ideological, political and cultural demands in each country in particular. In Serbia, stamps have been issued since 1866<sup>1</sup>. It was not before 1973, however, that the first woman was printed on stamps – the painter Nadežda Petrović (1873-1915), on the occasion of the 100<sup>th</sup> anniversary of her birth.

There is no unique position on the genre of postage stamps: Child (2005) claims that postage stamps belong to popular culture and therefore uses the applied semiotics in his research on the multitude of meanings of messages transmitted via postage stamps, based on Pierce's typology, the so-called trichotomy of signs<sup>2</sup>.

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<sup>1</sup> Since the emergence of stamps in the late 19<sup>th</sup> century in Serbia (the first newspaper stamp dates from 1/13 May 1866 – with the coat of arms of the Principality of Serbia, and the first regular stamp dates from 1/13 July 1866, with the image of Prince Mihailo Obrenović III), the Republic of Serbia has changed its territorial and political framework: 1. after the liberation from the Ottoman Empire it was an independent state, while its present-day northern part (Vojvodina) was still part of the Austro-Hungarian Empire; at the beginning of the 20<sup>th</sup> century, it was part of the Kingdom of Serbs, Croats and Slovenes, when Vojvodina was also annexed to that union (1918); in the mid-20<sup>th</sup> century – after the Second World War, Serbia was one of the republics of SFR Yugoslavia; at the end of the 20<sup>th</sup> century, this union was disintegrated into independent states, and Serbia remained for some time with Montenegro under the same name (1990-2006); followed by the independence period of the two countries since 2006.

<sup>2</sup> Regarding Pierce's semiotic approach, we need to stress that he stands for the attitude that logical tests should primarily focus on the study of the communicative sign, because it is the means by which the most important information about the outside world is obtained.



1. The first semiotic message transmitted by the stamp is self-referring, i.e., it identifies itself as a postage stamp. Conventionally, this self-identification is achieved by the appearance and size of the stamp, its publicity and visibility – affixed to an envelope or a postcard, and by the fact that it arrives indirectly – by post.

2. The second semiotic message is the identification of the country of origin of the stamp. There are many ways to deliver this message, and the easiest is reading the country name on the stamp itself.

3. The third message is a quantitative and concerns the question of whether the exact amount of money has been paid. This message is important, because the main purpose of the stamp is to charge for a postal service.

At the deeper semiotic levels, there are also messages that are conveyed to us by cultural, economic or political circumstances and value systems. They are interpreted through their features of design, colour, typography, painting, any drawings, engravings, photographs and other graphics typical of most stamps (Child, 2005, pp. 113-114).

Drawing on Pierce's classification of signs (index signs), Child underlines the significance of the iconographic semiotic message on the postage stamps. He claims that the post office, as an institution and a representative of the government, determines what message is to be transmitted and how (Child, 2005, p. 115).

Bushnell (2011, p. 830) talks about the concept of philatelic glass ceiling – women have limited access to higher levels of government and advancement in various areas of social, political, scientific and business life in the state, a situation that is reflected in postage stamps. This information can be interpreted twofold. Firstly, up to the 20<sup>th</sup> century, female characters were clearly absent from postage stamps, with the exception of representatives of royal families (e.g. a queen) or some allegorical figures (e.g. Liberty). Secondly, with changes in social circumstances such as the women's struggle for the right to vote or the expansion of women's educational opportunities, female characters slowly start to appear on postage stamps. Bushnell further classifies the stamps with female characters according to the areas of their contribution:

1. politics,
2. entertainment,
3. education and philanthropy,
4. religion,
5. science and technology,
6. sport,
7. "other" (Bushnell, 2011, pp. 836-845).

Adedze (2009, p. 235) examines the significance of commemorative postage stamps (issued on the occasion of special events, occasions or personalities of British and French colonists) in six independent countries in

West Africa (Benin, Ivory Coast, Ghana, Guinea, Nigeria and Senegal) in a long period of time (1857-2009) with the goal of explaining why some personalities are shown on them and are therefore paid respect, while others are not. He concludes that the ideology of the ruling regime has the monopoly over the postage stamps and that they reflect either domination or resistance as a subjective interpretation of the current policy. Adedze calls the personalities on these stamps colonial and postcolonial heroes. In order to conclude that the stamps belong to the domain of manifesting masculinity, he gives special attention to women (which are almost absent) – the most common female characters being Queen Victoria and Queen Elizabeth. He states that the countries under the French colonial power issued two commemorative stamps – one with the images of a charitable women and another with a woman spreading "civilization to the natives". After these countries gained, female characters started to appear on postage stamps (on the occasion of the International Year of Women 1975).

### *THE AIM OF THE RESEARCH*

The aim of this research is twofold. Firstly, we intend to show the degree of democratic changes in multinational, multi-confessional and multilingual Serbia during the last decade of independent statehood and on the example of the printed postage stamps with the images of women (2006-2018). The explanation for this part of the aim is the fact that the state of the Republic of Serbia has the three main directions: the affirmation of national politics; the intention to join the EU, which, in turn, requires democratic changes (Serbian National Strategy for the Accession of SCG to the EU, 2005; The Opening Statement of the Republic of Serbia, 2014). Secondly, we check how much the female citizens of Novi Sad are familiar with the women on the stamps.

### *THE RESEARCH METHOD*

#### *The Research Methods for Texts and Images of Postage Stamps*

In our research, we use the quantitative and qualitative (or interpretative) feminist content analysis (Reinharz & Davidman, 1992) in order to identify the women or women's figures depicted on the stamps.

What can be considered the text of a postage stamp? It is the unity of the verbal and non-verbal (pictorial) part of the stamp printed in a certain political and social context of the state. We can distinguish between the regular<sup>3</sup>

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<sup>3</sup> According to the Rule book on establishing a Plan for the issuance of commemorative postage stamps, securities and the motifs of regular postage stamps and securities in Serbia, the stamps today" are for general use and are issued depending on the needs of postal

and the commemorative<sup>4</sup> postage stamps, all approved by the Ministry of Trade, Tourism and Telecommunications of the RS for use according to the established procedure for each year (public information on this procedure is not available).

Out of a total of 574 printed stamps in that period, 106 (18%) of the analysed stamps in the corpus are commemorative stamps with the images of women or women's accessories, and only 9 of them (8.6%) are regular.

*The unit of analysis* is the postage stamp as a unity of verbal-nonverbal parts of meaning, a recognizable structure and the place where it appears (the upper right corner of a postal item). The verbal elements are the names in the Cyrillic (rarely Latin) script in Serbian (rarely in English) of: the publisher (the Post of Serbia), the state (Serbia), the person (female) or an accessory (e.g. an earring), and the cause (most often an anniversary). The verbal parts include numbers: the nominal value in dinars, the year of issue (e.g. 22 RSD, 2015). The visual presentation of the woman on the stamp can be a photograph, drawing, lithograph, illustration, graphics... (Figure 1).

The visual and the verbal elements together make up a communicative entity that transmits an implicit and/or explicit message (Janich, 2001, pp. 43-67; Bašaragin, 2014, p. 30). In the search for the message, we rely on the analysis of the genre (Lakić, 1999, p. 37), which involves the organization of the text-image with a certain task in writing or speech, which also involves the analysis of the role of the text in a given language community, which is in this case the study of the institutional culture of the postage stamps. Our starting point is the intention of the state institution of the Post of Serbia to make the stamps fulfil their basic monetary function and affirm certain ideological values of the society. In this regard, many authors talk about the advertising or propaganda of the ideology of the state through postage stamps (Adedze, 2009; Andreou, Stylianou & Zantidess, 2017; Bushnell, 2011; Child, 2005; Kevane, 2008).

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traffic, in accordance with the motives of regular stamps and securities issued by the Ministry responsible for postal services" (Redovne poštanske marke (2019, March 25). Retrieved from: <http://www.posta.rs/struktura/lat/filatelija/redovne-postanske-marke/redovne-postanske-marke.asp>).

<sup>4</sup> Commemorative stamps are issued "for special occasions so that an image or motif would mark a significant jubilee, event or date from national or world history, from sports, culture, science, etc., as well as to portray the themes from nature" (Prigodne poštanske marke (2019, March 25). Retrieved from: <http://www.posta.rs/struktura/lat/filatelija/prigodne-postanske-marke/prigodne-postanske-marke.asp> ).



Figure 1. The verbal and visual elements of a commemorative postage stamp

There is a distinction between the mandatory and optional elements of a postage stamp. *The mandatory ones include:* 1. monetary (nominal) value; 2. country name; 3. name of the publisher i.e. the post; 4. the year of issue; 5. the name (of the person). *The optional ones include:* 1. authorship (the designer of the stamp); 2. the occasion for printing.

There are three levels of context implemented in our analysis of postage stamps: 1. the broadest context is the country – the Republic of Serbia, as an independent state since 2006; 2. the narrow context consists of the collection of the disciplines of the women (or women's accessories) on the stamps; 3. the narrowest context is the unity of the linguistic and image content of the stamp with data on: a) the type of the stamp (commemorative or regular), b) the type of woman (famous, unknown, or it is about the women's accessory), and c) the life status of a woman (alive or dead).

#### *Classification of Stamps with Female Characters by Areas*

In the Republic of Serbia (2006-2018), we analysed 106 stamps with female characters (18%) and classified them into 8 areas: 1. art, 2. religion, 3. children, 4. tradition, 5. history, 6. sport, 7. science, and 8. miscellaneous (Table 1).

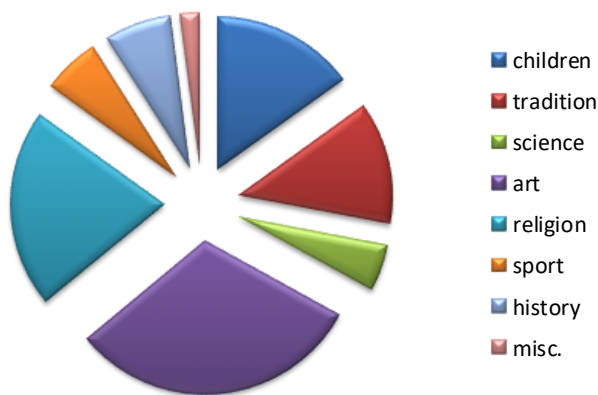
*Table 1. Number of stamps by categories and years of publication in the Republic of Serbia (2006-2018)*

Cat.	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	Sum
Art	1	3	1	7	-	4	3	3	1	2	1	6	1	33
Religion	-	2	2	2	5	2	2	2	2	1	2	-	-	22
Children	2	1	1	-	2	2	-	2	-	6	-	-	-	16
Tradition	4	-	2	2	2	-	1	1	-	-	-	1	1	14
History	-	-	-	-	-	-	-	-	-	6	-	-	1	7
Sport	-	-	3	1	-	1	-	-	1	-	-	-	-	6
Science	-	1	-	-	-	-	-	-	1	-	1	2	1	6
Misc.														

### RESULTS OF THE RESEARCH AND DISCUSSION

The results of our research are presented in three parts. In the first part we determine the inventory of the stamps with female characters and accessories. In the second part we check how much the female citizens of Novi Sad are familiar with the women on the stamps and for that purpose we conducted the survey in 2018 (see Appendix A). We use the obtained, preliminary results as a basis to propose to the Ministry in Serbia for 4 women in the field of artistic dance to get a regular stamp in 2019.

Figure 2 shows the presence of women on stamps by categories of activity.



*Figure 2. Presence of women on stamps by categories*

The most prominent area is "art" and refers to women from fine, musical, and stage arts and literature. Bushnell (2011) labels this category as "entertainment", which includes a wide range of popular and elite cultures (opera divas, actresses, writers, painters, but also "beauty queens"). In this context, the stage art from our sample has the function of entertainment and fun, because it predominantly covers actresses (Milka Grgurova Aleksić (printed twice, in 2007 and 2009), Rahela Ferari (2007), Neda Spasojević

(2009), Nevenka Urbanova (2009), Radmila Rada Savićević (2013), Ksenija Jovanović (2013), Marija Crnobori (2017), Olivera Marković (2017), and Ružica Sokić (2017)). They were all printed in the series "The Greats of the Serbian Theatre". There are also the director and founder of BITEF, Mira Trailović (printed twice, in 2006 and 2016), and the director Ognjenka Milićević (2015).

Within the category of *fine arts* (including the images depicting women alone or with other people), there are only two stamps commemorating female painters: Ljubica Cuca Sokić (2014) and (again) Nadežda Petrović (2018). The stamps with female painters' works of art include *Self-portrait* by Frida Kahlo (2007), *Self-portrait with velvet* by Milena Pavlović Barilli (2009), and *Self-portrait* by Katarina Ivanović (2011), and there are also two stamps with works of famous painters portraying unnamed women (2009, 2011).

*The musical art* is represented only through the series "The Greats of Classical Music", with the composer Ljubica Marić (2009), while the ballet art is absent.

*The category of literature* includes the stamp portraying the Brazilian writer Rachel de Queiroz, which was printed for the occasion of the "Joint Issue: Serbia-Brazil: Literature" (2011). The series of stamps "The Greats of the Serbian Literature" (2010) does not include a single woman.

This area also includes the stamps with mythical female characters and deities used as *allegories* for a particular field of art. These are ancient Greek and Roman goddesses and muses: the goddess Urania, protector of astronomy (2009, unknown occasion), the muse of fine arts (2012: the 75<sup>th</sup> anniversary of the Academy of Fine Arts in Belgrade), the muse of the musical art (2012), the muse of history (2012: the 150<sup>th</sup> anniversary of the Grammar School in Požarevac), and the goddess of justice Justicia (2013: the 50<sup>th</sup> anniversary of the Constitutional court). In addition to them, there is also an allegoric female figure on the stamp for the occasion of the International Year of Light (2013) – holding a torch in the right hand and a flashlight in the left while standing on a glowing ball.

Bushnell (2011) reports that the largest number of stamps on the territory of Argentina, Colombia, Cuba and the United States in the period 1893–2006 represents women in their political function and activists (Eva Peron), most often as enlighteners or philanthropists. There is not a single woman in this category in our corpus.

*Religion* is present on 22 stamps (21%) of the total corpus. These are the stamps with Virgin Mary, printed for the occasion of the great Christian holiday Christmas, from various frescoes from monasteries and churches, always with the image of Jesus-child, either alone or in the company of some other Biblical figures related to the holiday in the Orthodox Church. Saint Mother Theresa of the Catholic Church is a 2010 stamp printed for the occasion of the 100<sup>th</sup> anniversary of her birth in Kosovo.

Previous research data for different countries in the world confirm that the theme of religion is present everywhere when it comes to female characters on the stamps. Burzan (2013) researches stamps in Germany in the period from the release of the first stamp with a female figure (1900–present day, on an unknown sample). He states that the category of the Roman Catholic Religion most often includes the portrayal of Madonna and female saints, such as Mother Theresa. It is a favourite theme that extends to the mid-20th century. And so, the year of 1953/54 was proclaimed the year of St. Mary, and was marked with the stamps of famous painters (Dürer, Raphael and Holbein the Younger). Raphael's Sistine Madonna (2012) is published for the occasion of the 500th anniversary of the painting (Burzan, 2013, pp. 27-28).

The results of the research by Andreou, Stylianou, and Zantides (2017) show that the largest number of stamps in Cyprus are with female characters and confirms that they are related to religious motives (64, i.e. 40.5% of the total number are the stamps of women). Cyprus is predominantly Greek-Orthodox (about 78%), but there are also Sunni Muslims (18%)<sup>5</sup>. In Islam, the representation of the divine figure or female saints is not allowed, so the data from the analysis relate only to Christian (Orthodox) themes. The Virgin Mary is portrayed in most cases (59 stamps), while the remaining five stamps from this category portray the sister of St. Lazarus. The authors state that there are other female figures with a religious theme, but they do not play a significant role (Andreou, Stylianou & Zantides, 2017, p. 350).

Bushnell (2011) notes that the category of religion is often intertwined with the category of "education and philanthropy". In the corpus of the analysed stamps, there are Christian figures and saints portrayed in the role of mothers and patrons, yet are few in number (Bushnell, 2011, p. 844).

The category of "*children*" includes stamps issued for the occasion of the festival "Joy of Europe" (2006, 2007, 2008, 2013, and 2015), followed by the celebration of "Polio Eradication" (2011), "Children's Books" (2010), the so-called "Children's Stamps" (2015), "Old Toys" (2015), 60 years of UNICEF (2006), "The International Year of Biodiversity (2011). Among the total number of 16 stamps in this category, 6 are children's drawings, 8 are illustrations, and one is a photograph. The female authors of these children's drawings: Zarina Habulova (Russia, 2006), Isidora Ljuboje (Serbia, 2007), Nogoko Kasugi (Japan, 2008), Rita Kavac and Maja Trifunovic (Serbia, 2013), and D. Mihirbhai Doshi (India, 2015) are credited on the stamps issued for the occasion of "Joy of Europe". Four of the eight illustrations are dedicated to "children's stamps" and feature fairy-tale princesses, two are authored illustrations created for the "Children's Books" series and portray a girl

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<sup>5</sup> Kipar (2019, March 25). Retrieved from: <http://svetpedija.com/2013/05/kipar/>

reading and a girl catching a star with a hayfork in the background; one illustration is dedicated to "the International Year of Biodiversity" and features silhouettes of a girl watering a tree with a little bird by her side on the ground, while the stamp dedicated to "polio eradication" shows a silhouette of a young woman in the background. The only photograph features portraits of two girls (UNICEF, 2006). We did not find any data on the presence of girls (young women) on the stamps with the remaining authors.

The category of "*tradition*" includes the stamps belonging to the series "Museum Exhibits" and "Cultural Heritage". The set under the name "Bridal Jewellery" (2006) consists of stamps featuring the photographs of a ring, a diadem, an earring, and a necklace. The ring reappeared with the same design in 2009 and 2010. There are also stamps portraying girls in women's folk costumes from Šumadija and Kumodraž (2008). In addition to the ring, in 2009 a stamp was issued featuring a photograph of a female belt, and it reappeared as a regular stamp in 2010, 2012, 2017 and 2018. Therefore, the stamps in this category have the highest frequency in print (issue). Even the 2013 stamp in the "Joint Issue: Serbia-Algeria" does not leave the framework of Serbian tradition because it features a photograph of a woman in the Serbian folk costume weaving on a loom (Algeria is 99% inhabited by Sunni Muslims, while the rest are Roman Catholics and evangelical Protestants)<sup>6</sup>.

The category of "*history*", just like "*science*", is of a recent date, with the first stamps issued in the in 2015, in the series titled "British Heroines of the Great War in Serbia". The stamps portray the only female officer in the Serbian Army – Flora Sands from the United Kingdom, a member of the Scottish Women's Hospital – Catherine Stewart MacPhail, a Scottish doctor and first woman to be awarded the Order of the White Eagle – Elsie Inglis, the psychiatrist Isabel Galloway Hutton, the suffragette Evelina Haverfield, as well as the Scots-born physician Elizabeth Ross. It was no sooner than in 2018 that a female person from Serbia, Milunka Savić, appeared in this context.

The data testify that the historical role of women is only seen in the context of war conflicts. There are no female philanthropists and women's rights activists.

In the category of "*sports*" we make a distinction between anonymous and well-known women portrayed on the stamps. There are three stamps dedicated to female athletes: the tennis players Jelena Janković and Ana Ivanović (2008), and the swimmer Nađa Higl (2009), all issued because of the medals they won at world championships. They are the only women who have received recognition on postage stamps in their lifetime. The success of

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<sup>6</sup> Alžir (2019, March 25). Retrieved from: <https://hr.wikipedia.org/wiki/Al%C5%BEir#Religija>



the athletes becomes a means of promoting the country itself. As for the anonymous women on the stamps, there are illustrations of a female tennis player in 2008 (the Summer Olympics in Beijing), a skater in 2014 (the 22<sup>nd</sup> Winter Olympics in Sochi), and several silhouettes of volleyball players in 2011 (Women's European Volleyball Championship).

The category of "*science*" did not appear until 2014, with the stamp dedicated to Mileva Marić Einstein, reissued in 2016 and 2017, and the same issue of the stamp still exists today as a regular stamp quite frequent in use. In 2017 a stamp portraying Marie Curie was issued. Bushnell (2011, p. 844) argues that it is precisely the field of "science and technology" that implies respect for the success and achievements of women. His corpus covers the domains of health, aviation, and social sciences, and this category features the Amelia Earhart stamp issued in 2007 for the occasion of "the 75<sup>th</sup> Anniversary of the First Transatlantic Flight by a Woman Pilot".

We classified two stamps under "*miscellaneous*": one featuring a woman, a silhouette of a female singer at a microphone, and notes, issued for the occasion of "Song of Eurovision-Belgrade" (2008), and the other featuring female and male porcelain figures issued for "the 60<sup>th</sup> Anniversary of the Museum of Applied Arts in Belgrade" (2010).

Based on these eight categories featuring women, we can conclude the following:

1. The inventory of the category differs from what the other authors state in previous researches, which is related to the cultural and social circumstances of the given country.

2. Women are less represented on stamps than men, and this matches the findings of the other authors. This shows that women and women's contributions do not get equal respect.

3. The most common categories are "art" and "religion". Other researches reach the same conclusion. It is only in these roles that women can be present in our patriarchal society.

4. The stamps with the highest frequency in periodical printing are those from the category of tradition (women's accessories), followed by art (Petrović Barilli), and science (Mileva Marić Einstein). We ask the question whether the often-repeated stamps are a sign of notability or the promotion of the ideological values of the state?<sup>7</sup>

5. There are no women from minority groups on the stamps, whether they are from other ethnic and religious communities or persons with disabilities. Being hidden and invisible in this way, they are not recognized as equal citizens of the Serbian society today.

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<sup>7</sup> The only reason (to date) of reprinting a regular stamp is to print the stamp until the nominal value changes, and with also changes the motive of the stamp.

6. Many famous women are missing: the philosopher Ksenija Atanasijević, the writer Milica Stojadinović Srpkinja, the philanthropist Marija Trandafil; there are no other female rulers, activists, women's rights activists or partisans; the political role of women is completely marginalized.

7. The only women to get recognition on stamps in their lifetime are the female athletes, the representatives of the Republic of Serbia, for winning medals at international competitions. Success is the only reason to respect women because they celebrate and promote the country itself.

What is missing on the stamps in the analysed period? The culture and traditions of other ethnic groups living in Serbia (Hungarians, Albanians, Roma, Ruthenians, Bulgarians, Slovaks, etc.) are not represented, the exception being the two stamps from 2011, issued for the 100<sup>th</sup> anniversary of the festival *dužijanca*<sup>8</sup>, as a motive from the Bunjevci community (but without any female characters). The two stamps are "Museum Exhibits" featuring photographs of a church and a crown, both made of straw as decorative objects. Straw marquetry is a form of applied art and belongs to the tradition of the Bunjevci and Croatian people in the area of Subotica (Vojvodina) and is exclusively practiced by women (cf. Savić, 2007). The omission of female characters in this context is a serious disregard for the female creativity of the national communities of Vojvodina.

There are no priestesses of various Protestant religious communities in Vojvodina represented on stamps, in spite of their remarkable contribution to the building of peace in the multi-ethnic and multi-confessional Vojvodina in the 20<sup>th</sup> and 21<sup>st</sup> centuries (Savić, 2017). Can a priestess of a Protestant (minority) church, preaching in a minority community (Hungarian, Slovak, Ruthenian), be considered a famous woman from Serbia (where the Orthodox religious community is dominant)?

The women who have significantly improved the lives of people with disabilities in Serbia are also left out.

We can conclude that there are many factors (in addition to national, professional, ethical, racial, etc.) to be taken into account in the process of building canons for the famous women of Serbia. The interpretation of these results raises the question about the criteria for women to be given the opportunity to be famous in Serbia?

The fact is that the process of homogenization of the largest (Serbian) nation is evident in Serbia today and that only the women from this national community had the opportunity to be featured on the postage stamps: Mileva Marić Einstein and the painter Milena Pavlović Barilli.

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<sup>8</sup> *Dužijanca* is the final harvest festival of the Bunjevci community taking place in the fields, just like vintage in wine regions, for instance. The festival is quite old and dates back from the pagan times – they celebrate the god of fertility, because having bread would mean providing food for the entire family throughout the year.“ (Dužijanca (2019, March 25). Retrieved from: <http://www.bunjevci.net/bunjevacki-obicaji/duzijanca>).

The biography of *Mileva Marić Einstein* (1875-1948) shows that she is a *wife* of a well-known scientist who did not write a single scientific text, but today it is generally accepted in Serbia she was unfairly neglected while helping her husband, Albert Einstein, to build the theory of relativity. Can a person who did not write a single scientific paper be famous for her contribution to science?

*Milena Pavlović Barilli* (1909-1945), born in Serbia (from Serbian mother and Italian father), who achieved a successful and rich artistic career in America and Europe. How many women of Serbian origin who achieved a successful professional career in the world are part of the Serbian cultural and socio-political heritage and deserve a postage stamp?

*The Scope of Celebrity of the Women on Stamps:  
Preliminary Survey Results Conducted among Citizens*

After establishing the number and list of exceptional women printed on stamps in Serbia in the mentioned period, we explored the celebrity of these women among the women of various social and age groups in Novi Sad. We used a survey to check the attitude of women in Serbia towards the women on the postage stamps and their familiarity with the women from the list of the already published stamps. Therefore, the survey consisted of two parts. The first part comprised five questions (Do you take notice of the characters on the postage stamps in Serbia? If YES, can you remember a postage stamp featuring a woman? If YES, write down her name, surname, and what she is famous for. Should notable women be featured on the postage stamps? If YES, whom do you propose?). In the second part, we gave a list of women featured on the stamps in Serbia with the request to write down what the women were famous for (see the enclosed list in the Appendix). The survey was conducted among three groups of women of different ages: younger (18-28), middle (28-45) and older (45-65) in Serbian (the survey was printed in the Latin script, and the women's answers were in both Cyrillic and Latin scripts)<sup>9</sup>.

On the basis of this pilot research with a survey, we can conclude that women of different ages today in Novi Sad do not pay attention to the women featured on the stamps; they cannot remember if they have seen a woman on the stamps at the moment we ask them to remember; some of them have ready suggestions for women to be featured (usually

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<sup>9</sup> The younger group consists of 24 female students of the first year (Department of Serbian Language and Linguistics, born in 1990-2000), the ones who have just joined the process of higher education and attend the subject that is the basis of culture; the middle group consists of their professors and the staff working in the libraries of various departments of the Faculty of Philosophy (15). The older group consists of highly educated persons (retired), mainly from humanistic disciplines.

from the world of entertainment) and they estimate that the number of women who have been featured on the stamps so far is much fewer than the actual number. They are unanimous in assessing that women should be on postage stamps as well as men.

In the second part of the survey, the women were supposed to write down the profession of the women already featured on the stamps. Out of the 22 names given in total, the women recognized only certain actresses (Ružica Sokić, Olivera Marković), the painters Nadežda Petrović and Milena Pavlović Barilli, Mileva Marić Einstein, the heroine Milunka Savić, and athletes (Jelena Janković, Ana Ivanović and Nađa Higl). We have also identified various mistakes in determining the profession and field of activity. What is positive is that all women used gender-sensitive forms of occupation and the titles of women in the feminine gender.

Almost all the women agree that exceptional women should be on the stamps, but they do not know which of them already are, and repeat the stereotype in their proposals for rulers, writers, and actresses.

In short, this survey-based pilot research has confirmed that it is necessary to educate women additionally about the women on the postage stamps; it is also necessary to lead activist initiatives to propose more women to public institutions to be considered for being featured on the stamps. That is why one aspect of our suggested education relates to publishing an account on why the featured women were selected, and the other relates to proposing the women from the areas that have not been featured so far. This is why we proposed, as an example, the stamps featuring women from the field of artistic dance, who will have various anniversaries in 2019; because of this, we were able to learn how to send the proposal to the institution of the Post of Serbia, and also learn how this institution functions.

*Proposal to the Post of Serbia for Women  
in the Field of Artistic Dance in 2019*

Therefore, we have proposed to the Post of Serbia to publish the stamps featuring the four women who contributed to the development of artistic and contemporary dance from the feminist point of view, both because of their artistic inventions and their lives. After we had studied the rules for proposing people to be featured on a postage stamp, we formed a proposal for issuing an commemorative series of postage stamps with the theme "Artistic Dance in Serbia" – for four artists: the founder of choreodrama and educator Maga Magazinović (1882-1968), the founder of the contemporary dance Smiljana Mandukić (1908-1992), the primaballerina Jovanka Bjeogojević (1931-2015), and the primaballerina Dušanka Sifnios (1933-2016).

## CONCLUSION

There is a disproportion between the published works on famous women in Serbia today and their (in)visibility on the postage stamps: over the past 20 years, over 1,700 biographies of different women have been published, more or less notable in their fields of activity, but only a small number of them are featured on the stamps.

We can conclude that the results of the analysis of the postage stamps in Serbia in the period of independence from the Yugoslav community (2006-2018) confirmed the findings of other researchers in the world about the ideological labelling of this process – a clear national and political orientation based on the past and only implicitly focused on the future, i.e. joining the EU and confirming European and democratic values as important in the country today. One of those values is gender equality. When it comes to the ideological basis and gender: in the period of the independent Republic of Serbia, there are fewer women proposed to be featured on the regular stamps; the number being somewhat larger when it comes to commemorative stamps, compared to the list of male persons.

In the list of postage stamps published so far, the largest number women are from the area of art (entertainment), the fewest women are from science and music (composers), and there are no women from philosophy, literature, politic, social engagement, etc. There is also a gender discontinuity in relation to the historical period covered by the stamps: the women who contributed to the Great War (1914-1918) are dominant on the stamps; however, there are no women who had their contribution in the Second World War (partisans, participants of the People's Liberation Movement). After that, there is a significant number of famous women in the period of statehood of the independent Republic of Serbia.

The discontinuity in the visibility of notable women in the Republic of Serbia in the 20<sup>th</sup> and 21<sup>st</sup> centuries is evident in the knowledge of the female citizens of the state.

The results of our survey-based pilot research show that women do not pay enough attention to the important institutional visibility of women – on the postage stamps.

In response to this result, we have sent a proposal to the Ministry of Trade, Tourism and Telecommunications concerning four women in the field of artistic dance in Serbia, because this field of art is completely absent from the stamps, and the Ministry has accepted it. We conclude that it is important for women to take into account the exceptional achievements of the women from their country and be the ones to propose the appropriate recognitions for this.

**Acknowledgment.** This research was made within the project (number 47021) *Gender Equality and Cultural Citizenship: Historical and Theoretical Foundations in Serbia*, endorsed by the Ministry of Education, Science and Technological Development of the Republic of Serbia.

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## *APPENDICES*

### *Appendix A*

#### Survey

The postage stamps feature the images of the people who contributed to the development of society, in this case in Serbia. The Women's Studies and Research Association is in the process of researching women's portrayal on the postage stamps in Serbia in the last decade. We would be glad if you could take some time and answer some of the following questions related to the research project.

#### **Part I:**

Gender (circle): F M      Year of Birth:      Year of studies:

1. Do you take notice of the characters on the postage stamps in Serbia?  
YES NO  
If YES, can you remember a postage stamp featuring a woman? YES NO
2. If YES, write down her name, surname, and what she is famous for:  
(in case there are several, list them below):
  - 1.
  - 2.
  - 3.
3. Should notable women be featured on the postage stamps? YES NO
4. If YES, whom do you propose?
  - 1.
  - 2.
  - 3.
5. What is your estimated number of women featured on the postage stamps in Serbia in the past 10 years (circle one)?  
less than 10, more than 10, more than 20, more than 30

**Part II:** Are you familiar with the women in the following list (mark the person with + or -; if the symbol is +, write down what the person is famous for).

Nr.	Name	+/-	Famous for
1.	Milka Grgurova Aleksić		
2.	Rahela Ferari		
3.	Neda Spasojević		
4.	Nevenka Urbanova		
5.	Radmila Rada Savićević		
6.	Ksenija Jovanović		
7.	Marija Crnobori		
8.	Olivera Marković		
9.	Ružica Sokić		
10.	Mira Trailović		
11.	Ognjena Milićević		
12.	Ljubica Cuca Sokić		
13.	Nadežda Petrović		
14.	Mileva Marić Ajnštajn*		
15.	Milena Pavlović Barili		
16.	Katarina Ivanović		
17.	Milunka Savić*		
18.	Jelena Janković		
19.	Ana Ivanović		
20.	Ljubica Marić		
21.	Nađa Higl		
22.			

\*The students recognize Mileva Marić as the wife of Albert Einstein, and a scientist (as she is represented in media); Milunka Savić is recognized as a “heroine in the Great War”.

## **РОД И ИДЕОЛОГИЈА: ЖЕНЕ НА ПОШТАНСКИМ МАРКАМА У СРБИЈИ: 2006–2018.**

**Маргарета Башаргин<sup>1</sup>, Свенка Савић<sup>2</sup>**

<sup>1</sup>Женске студије и истраживања, Нови Сад, Србија

<sup>2</sup>Универзитет у Новом Саду, Филозофски факултет, Нови Сад, Србија

### **Резиме**

Циљ нам је да истражимо степен демократских промена у вишенационалној, вишеконфесионалној и вишејезичној Србији током последње деценије на примеру штампаних поштанских марака (2006–2018) са ликом (познатих) жена. Наиме, 2000. г. Република Србија постаје самостална држава и афирмише 1. националну политику, 2. жељу да постане чланица европске заједнице – ЕУ и 3. настојање да спроведе демократске промене у држави.

Јединица анализе је марка као јединство вербално-невербалних значењских делова. Ово јединство има обавезне и необавезне вербалне делове. Корпус чине марке



штампане 2006–2018. г.: од укупно 574 марака штампаних у том периоду, на 106 (18%) приказане су женске особе или женски предмети. У питању су пригодне марке, редовних је 8,6%.

Ко су знамените жене у Србији на поштанским маркама истражујемо на основу досадашњих примера штампања женских ликова на маркама током последњих 10 година. Укупно је 8 области деловања познатих жена у друштву Србије (редослед на основу %): уметност (33%), религија (22%), деца (16%), традиција (14%), историја (7%), спорт (6%), наука (6%), остало (2%).

Најзаступљеније су области уметности и религије: жене служе за забаву и разоноду или имају улогу мадоне (мајке), а највећу фреквентност у периодичном штампању имају марке из области традиције (женски предмети), потом уметности (Петровић, Барили) и науке (Милева Марић Ајнштајн).

На маркама нема жена из мањинских група, било да се ради о другим етничким и верским заједницама или особама са инвалидитетом. Изостају многе знамените жене: филозофинја Ксенија Атанасијевић, књижевница Милица Стојадиновић Српкиња, добротворка Марије Трандафил; нема такође ни владарки, активисткиња и боркиња за женска људска права, партизанки; политичка улога жене у потпуности је маргинализована. Признање за живота добиле су само спортисткиње репрезентативке државе Србије због освојених медаља на међународним такмичењима.

Спровеле смо анкету међу студенткињама с циљем да дознамо колико су познате јавности жене које су већ добиле марке током последње деценије.

Податак је да већина жена познаје уметнице, мање научнице.

Ко доприноси афирмацији придруживања европској заједници – ЕУ? То су 16 марака намењених будућој генерацији – назвале смо их деца.

Афирмација да се спроведу демократске промене у држави, када су у питању 'други', углавном изостаје. Напротив, присутна је имплицитна дискриминација по вери, роду, инвалидности, раси, етничкој припадности...

Удружење „Женске студије и истраживања” у Новом Саду у сарадњи са Удружењем балетских уметника Србије иницирале су код „Србија марке” штампање марака са ликом уметница из области уметничке игре: Мага Магазиновић (1882–1968), Смиљана Мандукић (1908–1992), Јованка Бјегојевић (1931–2015) и Душанка Сифниос (1933–2016). Штампање марака остварено је у јуну 2019.



## PUBLIC THEATRE'S SOCIAL ROLE AND ITS AUDIENCE<sup>a</sup>

Ksenija Marković Božović\*

University of Arts in Belgrade, Faculty of Dramatic Arts, Belgrade, Serbia

### Abstract

Today, public theatre is directed toward adapting to its contemporary socio-economic context. In doing this, it is trying to preserve its artistic values and at the same time fulfill and diversify its social functions and missions. When we talk about public theatre's social function, i.e. the public value it produces, some of the main issues concern its contribution to the most pressing social matters. In general, these issues concern public theatre's role in strengthening social cohesion, cultural emancipation and social inclusion, its role in the process of opening dialogues, revising formal history and re-examining traditional forms of thinking. Fulfilment of these functions is strongly linked with the character of public theatre's audiences. In more practical terms, the scope of public theatre's social influence is dependent on how homogenous its audiences are. If one considers artistic organizations' need for sustainability as a key factor in their need for constantly widening their audience, and particularly the inclusion of "others" (those not belonging to the dominant cultural group), in the context of contemporary society's need for social and cultural inclusion, then the task of today's public theatres becomes rather difficult. Simply said, there are too many needs to be met at the same time. The main questions this paper is asking is: *to what extent do Belgrade's public theatres understand the importance of diversifying its audiences, and how do they perceive their social role?* Starting from the fact that human capital is the primary resource and success factor of any theatre organization, we explore in what manner management and employees in these theatres address these issues, i.e. how they redefine theatre's social role and attract audiences that do not fit the dominant theatre audience model.

**Key words:** public theatre, theatre audience, theatre's social functions, theatre management.

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<sup>a</sup> The results of this research were presented at the World Congress of the International Federation for Theater Research that was held in Belgrade from July 9<sup>th</sup> to 13<sup>th</sup> 2018 (<https://www.iftr.org/media/3397/iftr-world-congress-belgrade-2018-program.pdf>)

\* Аутор за кореспонденцију: Ксенија Марковић Божовић,  
Факултет драмских уметности, Булевар уметности 20, 11070 Београд, Србија,  
[ksenijamarkovicart@yahoo.com](mailto:ksenijamarkovicart@yahoo.com)

## ЈАВНА УЛОГА ПОЗОРИШТА И ЊЕГОВА ПУБЛИКА

### Апстракт

Јавна позоришта су данас упућена на прилагођавање савременом социо-економском контексту, тако да сачувају основне (уметничке) вредности, истовремено диверзификујући своје функције и редефинишући друштвену мисију. Дебата о ширим друштвеним функцијама позоришта, односно карактеристикама јавне вредности којом оно (треба да) исходи, заснива се на разматрањима доприноса позоришта горућим друштвеним темама или – уопштено – његовој улози у процесима социјалне кохезије, културне еманципације друштва и друштвене инклузије; подстицању јавног дијалога, преиспитивању формалне историје, редефинисању традиционалних образаца мишљења и сл. Испуњавање таквих функција позоришта у спрези је са карактеристикама гледалаца изложених позоришним садржајима, што значи да обим друштвеног утицаја који позориште остварује експлицитно зависи од хомогености (или хетерогености) његове публике. Такође, иако су процеси ширења публике кључни у контексту стратешких активности оријентисаних на постизање одрживости позоришта *per se*, они су значајни и са „ширег” аспекта одрживог развоја савремених друштава, све више суочених са потребама у контексту друштвене инклузије „других” – оних који не припадају доминантној културној групи. Овај рад истражује *Да ли јавна позоришта разумеју важност диверзификације своје публике?*, те *Како она схватају своју друштвену улогу у том смислу?*. Полазећи од тезе да је људски капитал примарни ресурс и фактор успеха сваке (позоришне) организације, истражујемо: како менаџмент и запослени у београдским позориштима приступају овим питањима, односно каква су њихова искуства и ставови на тему редефинисања улоге позоришта и привлачења публике ван оквира редовног и постојећег модела.

**Кључне речи:** јавно позориште, позоришна публика, друштвена улога позоришта, позоришни менаџмент.

### INTRODUCTION

Theatre has always been perceived as “the driving force in the creation and acceptance of cultural values” (Муждека-Манџука, 2000, p. 19). Moreover, through its educational and upbringing potential and its “complex and eclectic structure” (Муждека-Манџука, 2000, p. 23) theatre is believed to influence the development of the society’s consciousness as well as that of an individual. Therefore, theatre’s position in the cultural sphere must be analysed not only from the point of view of its artistic values, but also from the aspect concerning its “more general” social values.

With the formation of first nation states came the establishment of public theatres by these nation states, public theatre being one more of the vehicles for building and empowering national identity and culture. During the last two decades of the 19<sup>th</sup> century, small, independent repertoire theatres were established as well, but they depended on ticket sales and patrons’ support until the end of the World War II, when the responsibility for their financial sustainability was taken over by the state. Thus, the growing infrastructure of subsidized theatre was “engaged in the task of democratization of the culture” (Klaić, 2016, p. 19-20). This meant that

states (and later governments at all levels) established and funded the work of theatre with the idea that theatre would contribute to overall social cohesion and cultural emancipation.

This vision of developing public theatre as one more instrument of a “welfare state” lasted until the last few decades of the 20<sup>th</sup> century, when the new socio-economic circumstances necessitated the need to rethink and redefine the social role of all art institutions. This led to conclusions that publicly subsidized theatre organizations now had to focus on creating public value. As John Holden explains, this meant maintaining one's inherited culture; enhancing trust in public institutions; contributing to equity and fairness; producing value for money; contributing to health, to prosperity; learning; strengthening local communities etc. (Holden, 2004, p. 50-51). Accordingly, although the primary goal for theatre production remained developing *artistic excellence*, the functions of public theatre have continually been widened following the changes and needs of contemporary societies.

### *CONTEMPORARY (SOCIAL) FUNCTIONS OF ART & CULTURE*

During the last decades of the twentieth century and as a result of the development of Cognitive capitalism, the affirmation of Knowledge-based economy and the creation of Network society, a new logic of social development has been constructed which significantly influenced the transformation of previous, generally accepted ideas about the social role of art and culture (see: O' Brien, 2014; Boutang, 2011; Castels, 2005). As a result, European cultural policies have been focused on mapping ways to exploit socio-economic potentials of culture, while an integral part of this strategy is the continuous promotion of new types of values which should be the outcomes of cultural work. In this context, many authors emphasize the importance of new economic cultural values incurred as a consequence of contemporary economic functions of culture (e.g. Trozbi, 2012, p. 29). However, the diversification of cultural values is the result of a much more extensive development of its social functions. With reference to this, Jennifer Craik explains that today the conception of cultural goals is motivated by notions of human improvement, so that cultural values on which the notion of cultural sustainability is built stems from a shared consensus of “core” or “universal” values that include a wide range of human concerns: participation and democratic rights; tolerance, compassion and inclusion; freedom, justice and equality; peace, safety and security; health, wellbeing and vitality; creativity, imagination and innovation; love and respect for the environment (Creik, 2007, p. 28).

Importance of culture in the wider social revival is often used to support the instrumental approach to culture. It is particularly linked to the promotion of creative and cultural industries. On the other hand, ideas

of fostering “intrinsic” cultural values are most often related to the development of traditional (“elite”) arts, promotion of public cultural institutions and support of independent artists. Notwithstanding this conditional division, in most developed countries, the development and support of artistic activities is considered in the context of developing instrumental strategies through which artistic activities are seen as instruments for dealing with current social issues and achieving social well-being (reducing unemployment, revitalizing the community, improving the image of society or its particular parts, social inclusion, rebuilding devastated economies, etc.). This also corresponds to the affirmation of culture as the “fourth pillar of sustainable development of society”. On the other hand, we can find a number of reflections challenging the notion that one can actually know what social values art and culture hold. These critics argue that such a claim implies that artistic experience can be generalized, when studies “from Pierre Bourdieu to Paul Willis” show that the value of the influence of the work of art varies enormously - depending on different factors related to one's identity (including: age, class, health, personal well-being, etc.) (Belfiore & Bennett, 2007, p. 4).

One more, particularly important, critique concerns the issue of measuring social impact of art and establishing a kind of “cult of measurement” in this sphere. The arguments against it vary – from the thesis that results of such measuring could reflect only the relationship between the artist and the audience at a particular location at a given moment, but not generally (Braun & Novak, 2007), to the one that it creates the tension of finding evidence and just seemingly offers facts, while practically its outcomes are insufficiently relevant data instead of a fuller understanding of culture (Belfiore & Bennett, 2007). Another common response to the imperative of measuring performance in art and culture is a standpoint that the main, intrinsic value of culture is that it changes people's lives, and that such a demanding role set before artists and cultural organizations should not be burdened with the additional task of proving empirically the effects of their work. Here, the focus is on the development and fostering of artistic excellence, but even in this context, at the end of the first decade of the 21st century, the notion of excellence was being redefined.

While excellence used to be considered a synonym for ‘*l'art pour l'art*’-ism, its contemporary definition is linked to the ability of art and culture to help our understanding of the place we have in the world, asking questions we wouldn't have asked otherwise, understanding the answers we otherwise would not have understood and respecting those things we have not experienced before (McMaster, 2008, p. 9). Therefore, by linking excellence with the experience that a cultural good or service evokes (and not with the excellence of its creation or the success of its realization), McMaster interprets the external influence that culture and art have as their intrinsic value, making a delicate transition from the instrumental to the intrinsic approach to the development of culture and art. Thus, although the concept of excellence and

the concept of instrumentalism seem as extreme opposites, they both recognize social "relevance of culture" (its ability to reflect society as a whole and embrace its diversity in the broadest sense) as one of the most important aspects of development of art.

### *THEATRE'S PUBLIC VALUE AND ITS AUDIENCE*

Structuring the cultural value is an intricate process grounded in the complexities of contemporary functions of cultural and artistic activities. Summarizing various theories on the topic we could conclude that the most "operative" division of cultural values is into: *internal* (endogenous) - in connection with the contribution to specific cultural (artistic) activity; *external* (exogenous): in relation to a wider social contribution; and *institutional* or *organizational* - in connection with contribution to institutional (organizational) development. Also, the notion of *public value* is emerging more and more as a key element in calculating cultural value, integrating (in a certain way) different types of external cultural values, supplementing them and operationalizing their projection (see: Holden, 2004, p. 50-58).

Likewise, we can classify contemporary functions of public theatre as 1) artistic (internal)<sup>1</sup>, 2) instrumental (external, social) and 3) institutional (organizational)<sup>2</sup>. Within this classification, the second group is of our particular interest. It consists of the following functions: creation and preservation of the expressions of cultural diversity, contribution to social cohesion and cultural emancipation, instigating critical thinking, opening dialogues and public debates, revising formal history, re-examining myths and traditional forms of thinking. Also functions related to positive economic effects of theatre productions belong to this group, e.g. reduction of unemployment, community revitalization, improving society's image(s) and strengthening cultural, social and human capital. In the context of this paper, we are focused on the previously mentioned instrumental functions related to theatre's contribution to the creation and acceptance of cultural values and its participation in the processes of an individual's cultural and social perception and identification.

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<sup>1</sup> *Artistic functions* are: encouraging innovation in the artistic form, engaging in the development of artistic experiment, preserving cultural heritage (especially dramatic heritage), education and talent development, providing artist mobility, providing production, transfer and transmission of knowledge about theatre arts, nurturing and developing the audience and affirmation, creation and preservation of the expressions of cultural diversity

<sup>2</sup> *Institutional functions* of public theatre are: establishing business focused on the audience, adopting cultural innovation, developing a business model based on combination of strategies in order to achieve synchronicity of economic and artistic sustainability, affirmation and development of partnerships and cooperation, providing education and continued professional development of the employees, and application of new technologies.

The dominant method for analysing these types of functions is by way of analysing repertoire policy and/or directorial approach to dramatic texts. This method answers to what extent a particular production responds to current social issues, and how successful it is in being a platform for one's reflections on the society whose part one is. This is *de facto* an important objective. However, when we do conclude that a play opens up critical dialogue, provides new insights and offers a constructive approach to burning topics, certain questions remain. Namely, who it is intended for; who takes part in the debate; and who is willing to actually change his or her own attitudes and perceive things from a different angle? In other words, what is important is: who this content is intended for and who was "brought" to see it?

Such a standpoint is linked with the view that the character of the audience determines largely the structure of the value chain that any given art institution (or its programme) aims to create. Although many authors consider that for the contemporary "cultural omnivore" (Peterson, 1992) classical division between high and low or elite and popular culture ceases to be significant - researchers show that reality is still closer to "Bourdieu's claims and conclusions"<sup>3</sup>. The upper classes are those who go to museums, opera, theatre and art galleries, while the lower classes, as well as specific social groups, never (or far less often) do these things. On the other hand, Alan Brown and Jennifer Novak express the opinion that development of artistic excellence in performing arts is particularly conditioned by orientation toward attracting new types of viewers. Brown and Novak base such a conclusion on findings that the degree of "aesthetic growth" (related to generating artistic values, deeper audience engagement and excitation of new interests in similar art programs) is most present in audiences who have not had similar experiences before (or those who belong to a professional audience) (Brown & Novak, 2007, p. 14-15). Moreover, the notion of homogeneous character of theatre audience is problematic due to not only the theatre organization's needs for widening the public in the context of their sustainability, but more so because of "more general" needs of contemporary societies for social and cultural inclusion of the "others" (people who do not fit the dominant cultural group).

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<sup>3</sup> Pierre Bourdieu believes that belonging to upper social strata implies not only the economic capital, but also adequate social, cultural and symbolic capital, i.e. knowledge that is prerequisite for understanding various forms of "elite arts". Unlike this, lower and marginalized social strata have a lack of habit (opportunity, desire) to enjoy these type activities (theatre, opera, ballet etc.), which consequently lead to a lack of cultural capital for their consumption of traditional arts (Bourdieu, 1993, 1997).



*PRACTICES AND ATTITUDES REGARDING AUDIENCE  
DIVERSIFICATION OF BELGRADE'S PUBLIC THEATRES*

The latest large-scale research on the cultural needs and habits of the citizens of Serbia (and its comparison with the previous ones<sup>4</sup>) showed that the structure of theatre audience is such that roughly one third is made up of active and non-theatre audiences, and about one-fifth of passive audience (see Опачић и Субашић, 2016, p. 41). Active audience is mostly comprised of women, young people aged 15-29, highly educated and those residing in urban areas (Опачић и Субашић, 2016, p. 63). When it comes to the composition of potential audience, women dominate men; older than 50 and middle-aged supercede the young; in terms of their education, citizens with secondary education takes the largest share of potential audience; while in terms of their place of residence, this position belongs to the people from rural areas. The largest share of non-audiences are people over 50, with primary school and from rural areas. In general, the first reason for not going to the theatre is the lack of time, followed by lack of interest and third - non-existence of the program (Опачић и Субашић, 2016, p. 62-65). In summary, research on this topic suggests that strategies for further development of the theatre should be oriented toward the implementation of activities that would make theatre more accessible to all citizens regardless, activate a part of the passive and non-goer audience to which cultural programs are not available and raise the level of knowledge and interest in theatre arts. Such a strategy would contribute to more efficient and effective fulfilment of the social-cohesive, inclusive and cultural-emancipatory functions of theatre. The importance of this is confirmed further by stakeholders' statements heard in public discourse, as well as by the introduction of laws and bylaws regulating the work of public cultural institutions<sup>5</sup>.

Though implementation of these recommendations is particularly expected from public cultural institutions, the practice of public theatres in Serbia is still different. This is evidenced by various studies, such as

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<sup>4</sup> In 2016 The Institute for the Study of Cultural Development conducted a research on the Cultural Needs and Habits of the Citizens of Serbia (Опачић и Субашић); before that: in 2011 - Research of the Cultural Practices of the Citizens of Serbia, (Миланков и Цветичанин); in 2010 – research on Theater audience in Serbia (Мрђа); in 2007 - Cultural needs, habits, and tastes of the citizens of Serbia and Macedonia (Цветичанин)

<sup>5</sup> The analyses of legislation (The Law on Culture, The Law on Budget System, (the adopted draft of) Strategy of cultural development of RS, The decrees on the criteria and method of selection of projects in the culture financed from the public budgets, Decree on Conditions, Criteria and Method of Acquiring or Revoking the Status of Institution of National Importance, etc.) suggests that subsidized art organizations and programs should aim at 3 parallel goals: 1) creating high artistic value (recognized by the expert public); 2) nurturing and flourishing of the expression of the Serbian national culture and the cultures of national minorities and 3) establishing a cultural dialogue as well as providing accessibility to other cultural expressions for the domestic public.

those of Dušica Dragin, that drew attention to the fact that public theatres more than anything strive for ever higher artistic reach, intended for critics, festivals and regular audiences with developed cultural needs that make up only 1-2% of the population (Dragin, 2019, p. 42). Among various research topics in this context, we can identify the one that deals with marketing activities of theatres as a common denominator. Maја Ristić (Ристић, 2013), Aleksandra Brakus (Бракус, 2014), Zdravković Milan (Здравковић, 2007), Lukić Drako (Лукић, 2006) are just some of the authors whose research time and time again shows insufficient and inadequate implementation of innovative marketing and PR techniques in the diversification of local theatre audience. In mapping the problem of achieving sustainability of public theatre institutions in Serbia, an important aspect is also the one studied by authors such as Milena Stefanović (Стефановић, 2013, 2017) and Ana Stojanović (Стојановић, 2016), who, in their doctoral dissertations as well as in a significant number of relevant papers, explore the relationship between theatre financing and its social role; i.e. the relationship between evaluation, decision-making and responsible (new public) management and the success of theatre in developing citizens' participation in the cultural life of the society.

### *Research Method*

The overall conclusion of the mentioned and other similar studies is that cultural policy makers do not sufficiently encourage activities related to audience development and expanding public theatre's social role. Therefore, strategic activities in this context are as expected: bottom-up, from theatre organizations and by themselves. As an additional important aspect of research on this topic, we identify the attitudes of theatre managers and their employees regarding the importance of theatre's public role, as a prerequisite for orienting their practical work to recommended direction. Accordingly, searching for the answers to the question about Belgrade's public theatres' practices regarding audience diversification, we established two points as the focus of our analysis: 1) their concrete practices related to attracting "others" - those who do not fit the dominant audience model: the elderly, poorly educated citizens, citizens who are from non-urban areas, national/religious minorities, socially vulnerable groups etc. and 2) the analysis of personal attitudes of directors and marketing sector employees on the subject of theatre's instrumental functions. By theatre's instrumental functions, here, we refer to these functions that relate to external (non-economic) influences of the theatre, its public value and "social relevance". As particularly important for the topic of this paper, we emphasize the theatre's contribution to social cohesion and cultural emancipation by way of producing basic and additional programs oriented towards audience education, connecting different social groups and inclusion of citizens who belong to vulnerable categories in the cultural life of the community. Also, by organizing additional programs that

enable “extended theatrical experience”, i.e. contextualize the content seen on stage, the theatre instigates critical thinking, opens dialogues and public debates. Furthermore, it enhances trust in public institutions by conducting responsible, legal and transparent business and contributes to equity and fairness by externally oriented business that respects diverse social differences within the community.

The findings that we will present are part of a (more extensive) research conducted in seven Belgrade theatres: Atelje 212 Theatre (Atelje 212), Yugoslav Drama Theatre (Jugoslovensko dramsko pozorište), Belgrade Drama Theatre (Beogradsko dramsko pozorište), Zvezdara Theatre (Zvezdara teatar), Terazije Theatre (Pozorište na Terazijama), Bitef Theatre (Bitef teatar), the Youth Theatre „Dadov“ (Omladinsko pozorište „Dadov“) and the Cultural Institution „Vuk Stefanović Karadžić“ (Ustanova kulture „Vuk Stefanović Karadžić“); from March to July 2017, as part of the preparation of a doctoral dissertation defended at the Faculty of Dramatic Arts in December 2018. It included 1) a survey of theatre directors; and 2) conducting questionnaires and in-depth interviews with employees in marketing sectors. The survey intended for theatre directors contained statements that respondents rated on a scale of 1 to 5, depending on the degree of agreement<sup>6</sup>. The survey comprises three parts. The first part refers to the business of the institutions they manage, the second to their personal views regarding the way public theatres operate in Serbia, and the third to their personal views on the importance of artistic, instrumental and institutional functions of public theatre<sup>7</sup>. The statements in the first two parts of the survey cover marketing activities, the evaluation of theatre work, development opportunities for diversifying theatre programs and services, program policy and guiding principles in its conception. The questionnaire intended for employees in marketing departments comprises numerous open-ended questions relating to existing theatre practices. Here, we will refer to the results that convey attitudes about: the mission, vision and program orientation of the theatre, the achieved results, theatre activities in local community, experiences in promotional activities and activities in researching audience reactions and needs, experiences in organizing programs intended for audience diversification and education and inclusion of specific and vulnerable social groups in the community's cultural life.

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<sup>6</sup> 1: strongly disagree; 2: generally disagree; 3: moderately agree; 4: mostly agree; 5: totally agree.

<sup>7</sup> The functions are classified according to the categorization shown in the chapter *Theater's Public Value and its Audience*. Theatre directors were asked to rate these functions on the scale of 1 to 5 depending on the extent to which they find them 1: not at all important; 2: small importance; 3: medium importance; 4: quite important; 5: very important.

### *Research Results*

The attitudes of theatre directors regarding the importance of additional programs vary. Approximately a half speaks positively in this context, while the other half are of the opinion that additional programs are merely optional, unnecessary part of the theatre's activities. The directors of Atelje 212, Zvezdara theatre and Dadov explicitly state that the primary task of theater is to enable the creation and dissemination of theatre performances, adding that any other activity is distracting them from this goal. Marketing sector employees of these theatres mention additional programs, such as occasional lectures, round tables or talks with the authors and performers within a jubilee or a similar event as significant. However, most of those who attend (and are invited to) these programs are exclusively part of the steady audience group, while when talking about programs intended for "others" – there are very few examples. Activities directed toward attracting senior citizens, people with special needs, marginalized groups, etc., largely come down to lowering ticket prices, but not to creating content suitable for the specific needs and tastes of these groups. The statement of the director of Terazije theatre marketing sector that "the organization of programs intended for vulnerable social groups is the responsibility of every public cultural institution" reflects the declarative attitude of employees in all theaters. However, practice demonstrates that most often theatres do not initiate inclusive projects (most often these are initiated by an NGO); at best, they participate in them.

The directors of Zvezdara Theater and the Cultural Institution "Vuk Stefanović Karadžić" disagree with the view that additional activities disrupt theatre's "primary goals", and generally agree that the organizations they manage are oriented towards animation of specific, minority and vulnerable social groups. However, their practice in this context is quite modest, too. Plays subtitled for hearing impaired persons are a part of Zvezdara Theatre's regular repertoire (Yugoslav Drama Theatre, too) are representative examples. The director of Bitef Theatre demonstrates the most affirmative attitude towards the development of additional programs, stating that artists who create in this theatre have to be engaged in the development of their own and future generations, that audience education programs are a prerequisite for its expansion and development, and that public theatre must occupy a central place in the cultural life of all citizens in a given community. Regarding inclusive projects, this theatre goes a step further involving specific groups in the creative process. To exemplify they list plays of their regular repertoire: "City", directed and conceptualized by Dina Radoman Caranović, is produced with and involves persons with disabilities, plays co-created with the Roma community and many others addressing pressing social issues.

The animation program of the "ordinary", adult audience, in addition to the mentioned round tables and lectures, includes an occasional "festival"

(or a sort of a “fair”) program usually held on the plateau in front of theaters; as well as educational tours of theater, such as those organized by JDP and Atelje 212<sup>8</sup>. The program of this type is intended for the devotees of theatrical art (sporadically for tourists, too) and does not represent the institutions' regular practice. Projects that would make the passive or non-audience of the theatre better acquainted with the program or theatrical life in general are even fewer. For example, programs attracting citizens from parts of the country with poor or no theatre offer are almost non-existent. A specific example of this kind is Yugoslav Drama Theatre project titled “Visit JDP”. However, its basic goal can be evaluated as more marketing oriented than socially-cohesive. The project was an organized visit to the Yugoslav Drama Theatre for the citizens of the Kriva reka village who have never visited a theatre before. The recording of their moving reactions went viral, but it also created a divided public opinion. While one part of the public and theatre community considered it a case of successful democratization and de-elitization by the JDP, others held the view that it achieved exactly the opposite, elitizing theatre arts further and “pointing fingers” at those people, (ab)using them for the theatre's own promotion.

The Cultural Institution “Vuk Stefanović Karadžić” director's words, that attracting young people is an important part of the activities of the theater he manages, reflect the attitude of all respondents. Indeed, system-wide, the most developed among additional programs are those intended for attracting the youth, mainly by organizing visits for high school students and – far less – by staging plays developed for this exact target/age group. Successful examples of youth animation are the festival “June deadline”, summer event “A dance by Vuk” and winter event “Fairy Tales Plateau” (all by Cultural Institution „Vuk Stefanović Karadžić”), as well as different acting schools. Beside Dadov (which is a youth amateur theater and as such focused on drama education of young people) Bitef is also a theatre that creates “deeper” experiences with/for young audiences by developing a specific acting school aimed at educating young audiences and production of specific programs for them<sup>9</sup>.

Most directors believe that the work of the marketing sector is of great importance for audience animation. In this regard, the manager of Atelje 212 marketing sector notes that, since the end of 2000, the importance of this sector in improving ticket sales has received significant recognition. However, this recognition has not resulted in allocating an adequate budget

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<sup>8</sup> In these educational tours visitors have the opportunity to see the space “behind the stage”, hear about the process of play preparation and get information about the history of an institution.

<sup>9</sup> Regarding the work of this school, the artistic secretary and director of Bitef say that it was founded with the idea that it is necessary to provide more institutional frameworks for the participation of young people in theatrical life.

for marketing purposes. Other respondents also agree that innovation in the promotion of plays and theater as a whole bring good results, but that “marketing campaigns require the financial resources that are most often lacking.” The outcome of marketing activities, without exception, is communication with the existing audience, while attracting passive and non-audience is lacking. In this sense, the most successful examples are the actions of large ticket discounts that attract the wider public (JDP), the development of communication on social networks through interesting projects involving famous actors (Zvezdara: facebook columns “10 questions for” and “Stories from the theater”) and the promotion of programs in public space (C.I. Vuk: promotions on the plateau in front of the Institution, in shopping centers, main shopping street and at the faculties).

The mapping of audience reactions is an important segment of the work of marketing sector. These are collected “directly from the performance”, through the web site and social networks. The viewership of the play is determined exclusively by the number of tickets sold, while the attitude on the topic of factors in evaluating the success of the theatre is almost the same for all respondents. Both directors and employees in marketing sectors say that the success of the season is generally not measured on the basis of the professional public’s (theatre critics and academics) opinion, nor is the number of tickets sold taken to be a measure of success. The statement “we know how much we are worth” is generally marked as “mostly agree” though the respondents admit that the processes of determining that value is quite weak because in practice it is reduced exclusively to a formal annual report to the City Assembly.

When it comes to the managers’ attitudes regarding instrumental functions of public theatre, results show that, on average, these functions are the least important for them. Most important are the artistic functions, followed by institutional functions. Moreover, the average grade of importance of general social functions (creation and preservation of the expressions of cultural diversity, contribution to social cohesion and cultural emancipation, instigation of critical thinking, opening of dialogues and public debates, revising formal history, re-examining myths and traditional forms of thinking) within the set of instrumental functions is 3,33 (out of 5), while the importance of positive economic externalities of theatre’s work (reduction of unemployment, community revitalization, improving society’s image or the image of one of its actions, etc.) is graded 3,83. What holds our interest in this finding is the comparison between the low grades for socially-cohesive functions related to the de-monumentalization of cultural memory and the importance of public theatre’s role in opening dialogues and public debates on one side and high grades of functions associated with positive economic externalities of theatre’s work - on the other. The reason why these results were unexpected is the fact that representatives of Belgrade’s and Serbia’s theatre scene often stress the importance of the development of critical thinking and freedom of

expression, while they usually distance themselves from the standpoints related to the socio-economic benefits of theatre practice.

According to the respondents, general social functions theatre should have are the affirmation, creation and preservation of the expressions of cultural diversity, contribution to social cohesion and contribution to cultural emancipation. They consider contribution to social inclusion as less important, as is confirmed by the practice of the institutions they manage. Even though artistic functions are not in the focus of this analysis, we have to mention that the highest grade in this group was given to the function of nurturing and developing audience, which we, in a sense, find paradoxical. This is because the corresponding practice to this function should start from the tastes and needs of the audience in creating the program offer (which should be actively determined by closely following audience reactions to the offered content and the continual mapping of new audience groups that need to be animated), and this is obviously not the case. In support of this is the finding that the majority of directors agree that the audience's taste is not the starting point when designing seasonal repertoire. Moreover, they consider the audience's taste to be in collision with the "taste of art" (which theatres strive to satisfy) and link it with the "commercialization of art". Therefore, we can conclude that the declared orientation of the managers toward nurturing and developing audience is actually about nurturing and developing the ideal or "discourse audience", which is not an externally given fact, but the result of the discourse production within the cultural institution (Tomka, 2015, p. 7).

Finally, the previous conclusion is also confirmed by the answers related to the list of priorities among institutional functions. They are not the focus of this paper, but it is important to note that within them, too, nurturing and developing the audience is seen as the most important organizational activity, followed by innovations in the exploitation of resources and the increase and exploitation of the social and cultural capital. However, the positive standpoints on the importance of innovation in the exploitation of resources are not accompanied by a high grade of the function related to the development of programs and services, so the question arises: what does innovative approach to resources refer to? In addition, attitudes toward the development of the processes of (self)evaluation is rated with low grades of importance. In general, managers consider the existence of performance indicators to be moderately important and demonstrate a neutral attitude toward the fact that there is a strong link between the financing of public theatre and its role in the society. In that sense, this research confirms that the existing parameters of a theatre's performance are reduced to quantitative indicators (number of premieres, number of tickets sold, number of awards won, etc.) and do not contribute enough to the diversification of theatre audiences, but rather depict an overall lack of explicit orientation to strategic activities in that context.

## CONCLUSION

Relevant research shows that there are many reasons for insufficient work on theatre audience development in Serbia. This particular one offers an additional aspect for understanding such a situation – the aspect related to personal and professional attitudes of people who create theatre life in a society directly. We could find a reasonable explanation for the diagnosed situation in the difficult position of Serbian theatres – the fact that in turbulent, decades long, socio-economic atmosphere it has been an imperative (and a challenge) to preserve and enable theatrical production at all. Thus, since its main goal is to create artistic value, it is not surprising that practices, as well as attitudes, are mainly focused on preserving artistic excellence.

Still, and with this “excuse” in mind, we have to highlight that the homogeneous character of theatre audience seriously affects the scope of its social and artistic influence. For theatre management one of the most important aspects has to be the planning and implementing innovative methods of audience development. Moreover, they have to move from deepening the relationships with existing audiences to establishing new relationships with theater’s “non-audience” – the audience outside the dominant audience group. This is achievable by developing programs for vulnerable social groups (people with special needs, immigrants), minority culture groups and groups that according to research represent potential audience (senior citizens, people from places with poor supply of theatre content). Also, the development of educational programs and programs that initiate public dialogue on current social issues; even by exploiting the location and spatial resources of theatre in the direction of expanding its activities in the local community. The development of such programs should be preceded by research of different audience types, as well as the establishment of active cooperation with academia, educational institutions and various civil societies in designing adequate programs that will meet diverse cultural needs and tastes.

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## ЈАВНА УЛОГА ПОЗОРИШТА И ЊЕГОВА ПУБЛИКА

Ксенија Марковић Божовић

Универзитет уметности у Београду, Факултет драмских уметности, Београд, Србија

### Резиме

Јавна позоришта су данас упућена на прилагођавање савременим социо-економским приликама, тако да очувају основне (уметничке) вредности, истовремено диверзификујући своје функције и редифинишући друштвену мисију. Дебата о ширим друштвеним функцијама позоришта, односно карактеристикама јавне вредности којом оно (треба да) исходи, заснива се на разматрањима доприноса позоришта горућим друштвеним темама или – уопштено – његовој улози у процесима социјалне кохезије, културне еманципације друштва и друштвене инклузије; подстицају јавног дијалога, преиспитивању формалне историје, редифинисању традиционалних образаца мишљења и сл.

Најчешћи правац промишљања на ову тему заснива се на анализама репертоарске политике и/или успешности редитељског поступка у разматрању различитих друштвених питања. Међутим, чак и када (тј. ако) закључимо да одређена представа, позоришна кућа или фестивал нуде нове увиде и критички приступ „горућим темама”, намеће се питање коме је то заправо намењено – ко учествује у представом иницираном дијалогу, ревидира постојеће ставове и стварност сагледава из нових углова. Другим речима, када расправљамо о позоришту, а нарочито у контексту теме развоја његове друштвене улоге, као значајно питање намеће се „Које је позориште намењено?”.

Такав дискурс постаје прворазредан имајући у виду актуелна друштвена кретања (миграције, стратификације), али и изражену хомогеност позоришне публике као глобално присутну појаву. Ту појаву у Србији потврђују истраживања културних навика и потреба грађана чији налази (из године у годину) сведоче о томе да сталну позоришну публику у највећој мери (и готово искључиво) чине људи средњег доба, средње класе и интелектуалци. Она закључују да даљи развој позоришта захтева стратешко усмерење ка примени активности које би позориште учинило доступни-

јим свим грађанима; активирале део пасивне публике и непублике, којима културни програми нису доступни у довољној мери; те које би дугорочно утицале на подизање нивоа знања и интересовања грађана за позоришну уметност. Међутим, релевантне студије показују да културна политика у недовољној мери подржава практичан рад позоришта на развоју публике и ширењу друштвеног утицаја, због чега се промене у овом смислу очекују одоздо нагоре – од стране самих позоришних организација.

Полазећи од тога, те имајући у виду да се примена таквих препорука нарочито очекује од јавних позоришта (која су – за разлику од независне сцене – егзистенцијално „сигурнија“), рад мапира парадигматична искуства позоришта чији је оснивач Скупштина града Београда; и истражује мишљења и ставове менаџмента и запослених у овим установама – на тему важности процеса развоја, неговања и анимације публике, као и важности ширења друштвене улоге (јавног) позоришта уопште. Анализирајући постојеће праксе и поредећи их са исказаним ставовима испитаника, аутор закључује о недовољним активностима на ову тему и нејасним (па и некритичним) ставовима породице посредника и доносилаца одлука. Исход (и узрок) таквог стања је непостојање стратешке оријентације јавног позоришта којом би се планирање и имплементација савремених метода развоја публике сагледавале као начин редефинисања његове друштвене мисије и процеси у контексту обезбеђивања његове одрживости у актуелном друштвеном контексту.



**ПСИХОЛОГИЈА**  
**PSYCHOLOGY**



## СТРУКТУРИСАНО И НЕСТРУКТУРИСАНО ВРЕМЕ И РИЗИЧНО ПОНАШАЊЕ АДОЛЕСЦЕНАТА У УСЛОВИМА ДРУШТВЕНЕ КРИЗЕ

Биљана Јаредић\*, Јелена Минић, Татјана Радојевић

Универзитет у Приштини – Косовска Митровица,  
Филозофски факултет, Косовска Митровица, Србија

### Апстракт

Циљ истраживања био је утврдити колико адолесценти радије бирају поједине типове структурисаног слободног времена и неструктурисаног времена (доколице), као и њихову повезаност са ризичним понашањем адолесцената у условима друштвене кризе. Узорак су чинили адолесценти ( $N = 287$ ), 116 или 40,4% мушких и 171 или 59,6% женских испитаника, од 18 година до 24 године, просечне старости 20,44 године ( $AC = 20,44$ ,  $SD = 2,75$ ), који живе на територији Косова и Метохије. Коришћени су: Упитник за процену слободног времена и доколице (конструисан за потребе истраживања), Скала за процену ризичног понашања (енгл. Risk Behavior Rating Scale (RBRS); Scaar, 2009). Подаци су обрађени дескриптивном статистиком, корелационом и регресионом анализом,  $t$ -тестом. Резултати су показали да адолесценти најрадије бирају интернет као неструктурисану активност, а најмање позориште као структурисану активност. Добијена је негативна повезаност академског успеха и ризичног понашања, што указује на то да уколико адолесценти постижу боље резултате у академској каријери, имају мање склоности ка ризичном понашању. Према добијеним резултатима, младићи су склонили ризичном понашању од девојака, а ризично понашање адолесцената може се предвидети са 14% варијансе (значајни предиктори су неструктурисано слободно време и пол адолесцената). Један од циља рада био је да укажемо на значај структурисања слободног времена адолесцената у циљу подстицања њиховог адекватног раста и развоја, уз неопходно ангажовање стручњака из различитих области.

**Кључне речи:** слободно време, друштвена криза, ментално здравље, интервенције.

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\* Аутор за кореспонденцију: Биљана Јаредић, Филозофски факултет,  
Филипа Вишњића б.б. 38220 Косовска Митровица, Србија, biljkaja@gmail.com

## STRUCTURED AND UNSTRUCTURED TIME AND RISKY BEHAVIOR OF ADOLESCENTS IN CONDITIONS OF SOCIAL CRISIS

### Abstract

The main objective of this research is to determine how much adolescents prefer certain types of structured free time and unstructured time (leisure time), as well as their connection with risky behavior of adolescents in social crisis. The sample consists of a number of adolescents ( $N = 287$ ), 116 or 40.4% of male and 171 or 59.6% of female respondents, age from 18 to 24, average age is 20.44 years ( $AS = 20.44$ ,  $SD = 2.75$ ) living in the Autonomous Province of Kosovo and Metohija. Leisure and Leisure Assessment Questionnaire (constructed only for research purpose), Risk Behavior Rating Scale (RBRS), Scaar, 2009 were used in this research. The data was processed through descriptive statistics, correlation and regression analysis and the T-test. Results showed that adolescents mostly prefer internet as an unstructured activity and the least preferred is the theater as the structured one. A negative correlation was obtained between academic success and risky behavior, which indicates that if adolescents achieve better results in academic career, they have less propensity for risky behavior. According to the results, boys are more prone to risky behavior than girls, and risky behavior of adolescents can be predicted with 14% variance (significant predictors are unstructured leisure time and the gender of adolescents). Within our work, our objective is to bring attention to the importance of a structured way of spending leisure time regarding adolescents, with necessary engagement of experts from different areas.

**Key words:** leisure time, social crisis, mental health, intervention.

### УВОД

Појмови *слободно време* и *доколица* често се користе као синоними, стварајући додатне проблеме истраживачима (Caldvell, 2008). Слободно време и доколица су комплексни и променљиви друштвени феномени (Cohen-Gewerc & Stebbins, 2007), који су присутни у животу сваког појединца у различитим формама и детерминисани су културним и историјским околностима, узрастом, полом, занимањем, местом живљења, интересовањима итд. Стога се због бројних различитих, а неретко и супротстављених, значења (Henderson, 2010; Godbey, 2008), поред терминолошких дилема јављају и појмовне. Слободно време је време које особа проводи ван редовног, обавезног, позивног, домаћег или било каквог рада и извршавања задатака и служи за разоноду, одмор и рекреацију (*Педагошки речник*, 1967). Као саставни део живота сваког појединца и његове активности, слободно време се одређује и као време изван професионалних, породичних и друштвених обавеза, у којем појединац по својој вољи бира облике и садржаје одмора, разоноде и стваралаштва (*Педагошка енциклопедија*, 1989).

Слободно време је предмет расправа од античких времена, па све до данас, али се као друштвени феномен проучава тек у индустријском друштву. Истраживањем слободног времена баве се



стручњаци различитог профила: психолози, педагози, социолози, филозофи итд., отуда и бројне дефиниције и приступи истраживању. Различите перспективе гледања на слободно време рефлектују и разноликости у организацији и уређењу друштвеног живота и социјалних односа кроз историју и сврставају се у четири категорије, и то слободно време као: време, активност, стање духа и стање постојања (Goodbey, 2008) или као: преостало време, активност, функционално време и слобода (Rosić, 2005). У литератури се слободно време најчешће посматра као: време преостало од рада, ослобођено обавеза било које врсте, тежња за слободно изабраним (рекреативним) активностима и време проведено у активности која пружа интринзично награђујућа искуства (Csikszentmihaly & LeFevre, 1989).

Када су у питању адолесценти, слободно време је, пре свега, педагошки проблем, простор самоактуализације и остварења личности, који омогућава интеракцију са другима неопходну у процесима индивидуализације, социјализације и инкултурације (Previšić, 2000). Са друге стране, и важан је чинилац развоја личности, који пружа могућност адолесцентима да активирају своје стваралачке снаге, задовоље интересе и потребе, као и социјално, емотивно, стручно, физичко, когнитивно ангажовање и развој (Irbi & Tolman, 2002). Слободно време је простор за експресију аутентичног Ја (Holt, 1998), где не постоје баријере као у радном, образовном, друштвеном или породичном миљеу, у ком се адолесценти могу опустити и изразити свој прави идентитет, слободно бирајући активности (Irby & Tolman, 2002). Прецизније, сматра се да је слободно време:

„важан фактор еманципације личности, услов за рекреацију и одмор, јер пружа могућност за социјализацију и хуманизацију личности и да је у функцији самовредновања и самоидентификације појединца” (Đorđević, 2003, p. 43).

Слободно време може се одредити и као укупност времена, стања и активности које нису условљене биолошком, социјалном и професионалном нужношћу, при чему је важно и да адолесценти преузму одговорност за сопствени развитак (Previšić, 2000).

У литератури постоји неслагање у вези са развојним могућностима и погодностима повезаним са структурисаним и неструктурисаним активностима адолесцената током слободног времена. Структурисане активности одликује јасна структура и учешће појединца које се одиграва унутар система који укључује ограничења, правила и циљеве (активности као што су: спорт, хоби, уметности, музика, учешће у волонтерском раду и слично) (Larson, 2000). У структурирању слободног времена наилазимо на садржаје који имају формативну (доприносе развоју здраве, културне и стваралачке личности), примарно-превентивну (отклањају негативне утицаје друштвено штетних поступака) и куративну улогу (средство преваспитања, по-

себно у установама за рекреацију и ресоцијализацију) (Rosić, 2005). Насупрот томе, неструктурирано слободно време или доколица, дефинише се као време изван обавеза које се проводи без одређеног садржаја и поистовећује се са беспослицом, за разлику од структурисаног слободног времена, као термина са социолошком и педагошком конотацијом (Јанковић, 1973). Доколица се и у изворном значењу односи на слободно време (доконицу), док је доколичан онај који није заузет послом, који је беспослен или докон (Анић, 2009). Прецизније, доколица је „подручје свакодневног живота у којем појединац може реализовати неке од својих способности и интереса који у другим подручјима бивају занемарени” (Пишин, 2002: 270). Неструктурисане активности обично подразумевају дружење са пријатељима, гледање телевизије и употребу телефона (Larson & Verma, 1999), имају мало развојних бенефиција (Cooper, Valentine, Nye & Lindsay, 1999) и носе са собом већи ризик од укључивања адолесцената у антисоцијална понашања (Mahoni, 2004; према Osgood, Wilson, O’Malley, Bachman & Johnston, 1996).

Ризично понашање се углавном везује за адолесценте и као најчешћа ризична понашања наводе се: конзумирање цигарета, алкохола, дрога, често мењање сексуалних партнера, учествовање у крађама, агресивно понашање итд. Ризичним понашањима се сматрају сва она понашања којима особа доводи у опасност сопствено здравље и угрожава друштвене вредности (Ljubičić, 2012). Са аспекта развојних теорија, познато је да су деца и адолесценти често изложени различитим васпитним утицајима родитеља, вршњака и средине који нису у складу са хуманим циљевима њихове заштите и који могу изазвати различите облике ризичног понашања (Zloković i Vrcelj, 2010). Најчешћи етиолошки чинилац који се наводи у објашњавању ризичног понашања је непосредна средина у којој млади одрастају и живе (доступност наркотика, оружја, присутност насиља, миграције, економска криза, незапосленост, расна и/или етичка дискриминација). Значајан фактор за настајање ризичног понашања је и породична средина. Уколико су родитељи склони конзумацији наркотика, криминалу, превише попустљиви и слично, расте вероватноћа да ће се млада особа ангажовати у неком ризичном понашању (Ljubičić, 2012). Такође, као битни фактори који могу утицати на појаву ризичног понашања наводе се и ниско школско постигнуће, бежање из школе, дружење са вршњацима који имају проблеме у прилагођавању, затим бунт, социјална изолација, одређене личне карактеристике итд. (Bernstein & Cassel, 2007, према Ljubičić, 2012).

Друштвена криза је сложен социолошки појам и дефинише се као илегалитет друштвеног система, у ком се доводи у питање постојећа структура система и угрожава његов идентитет, што доводи и до опште несигурности грађана који су кризом погођени (Veјnović,

2004). Најчешће друштвена криза настаје у периодима када постојећа организација друштва и институције не обезбеђују задовољење човекових потреба, повољне услове за живот и рад (Munjiza, 2002) и не пружају могућност решавања постојећих проблема (Hafner, 1997). Друштвену кризу карактеришу: односи неусклађености, стагнације и противуречности у различитим социјалним сферама, с централном димензијом – политичком кризом (која се огледа у кризи институција власти и демократије) и нарушавањем нормалног функционисања и начина живота појединца и заједнице. Уколико је друштвена криза сложена и дуга, долази до промене односа појединца према животу, раду, другим људима, према самом себи, мењају се ставови и вредности, али и начини провођења слободног времена, као и однос према слободном времену (Ћurčić, 2005). Друштвена криза може имати последице по ментално здравље и опште психофизичко функционисање становништва свих узрасних група, нарочито деце и адолесцената, јер су они осетљивији на деловање стресора, њихове стресне реакције су интензивније и исходи неповољнији (Kaličanin i Petrović, 2001). Провођење слободног времена код адолесцената у условима друштвене кризе важно је за истраживање због тога што су с једне стране адолесценти осетљиви део популације, а с друге стране, одрастање у условима друштвене кризе доводи у питање и доступност ресурса за његово квалитетно и структурисано провођење. Због свега горенаведеног, циљна група овог истраживања су управо адолесценти. Такође, определили смо се да испитујемо провођење слободног времена код адолесцената, између осталог, и због тога што постоји пуно начина и могућности да се слободно време адолесцената структурише и учини квалитетнијим, што с друге стране може довести до бројних развојних бенефиција и позитивних ефеката на њихов развој и опште функционисање.

### *МЕТОД*

Основни предмет истраживања био је испитати како адолесценти проводе, тј. структуришу, своје слободно време, и то структурисано и неструктурисано време, тј. слободно време и доколицу код адолесцената који живе у условима друштвене кризе, и њихову повезаност са ризичним понашањем. Основна идеја аутора рада била је да се добијени резултати искористе за стручно ангажовање, подршку и осмишљавање начина провођења слободног времена зарад заштите и унапређења менталног здравља адолесцената и могућих развојних бенефиција.

Циљ истраживања био је утврдити израженост појединих типова структурисаног и неструктурисаног слободног времена код адолесцената у условима друштвене кризе, као и њихову повезаност са ризичним понашањем.

Задаци истраживања били су: утврдити израженост различитих типова слободног времена (структурисаног: бављење спортом и физичким активностима, певање и свирање, сценско-плесне активности (фолклор), хоби, позориште, читање књиге и волонтерски рад) и доколице (неструктурисаног: дружење са вршњацима, кафићи, играонице, Фејсбук, Твитер и остале друштвене мреже, шетња и лешкарење) и њихову временску димензију (колико времена проводе у датим активностима); утврдити разлике у изражености структурисаног и неструктурисаног слободног времена и ризичног понашања у односу на пол; утврдити повезаност структурисаног и неструктурисаног слободног времена са ризичним понашањем и неким социодемографским карактеристикама, као и предвидети ризично понашање адолесцената на основу варијабли које су укључене у истраживање.

У истраживање су укључене следеће варијабле: слободно време (структурисано и неструктурисано), ризично понашање и социодемографске варијабле (пол, године живота, успех у средњој школи, тј. на факултету, број чланова породице и редослед рођења). Коришћени су: Упитник основних социодемографских карактеристика (конструисан за потребе истраживања), Упитник за процену слободног времена и доколице и Скала за процену ризичног понашања (енгл. Risk Behaviour Rating Scale, скр. RBR; Scaar, 2009).

Слободно време је:

„време које нам преостаје кад завршимо све своје радне, школске, породичне и друштвене обавезе и којим можемо располагати према своме нахођењу, без спољне присиле и принуде, како нам лично одговара и на начин који нам највише одговара” (Trnavac & Đorđević, 2010, p. 126).

Варијабла *слободно време* операционализована је преко упитника који мери израженост одређене слободне активности и њену временску димензију. Упитник за коришћење слободног времена и доколице конструисан је након пилот-истраживања у којем су методом фокус-групе са младима издвојене различите врсте провођења слободног времена. У пилот-истраживању било је укупно 5 фокус-група, са 6 до 8 учесника, тј. адолесцената (од 15 година до 24 године). Основна питања у фокус-групама била су концентрисана око тога како изгледа њихова дневна рутина, где проводе време, са киме најчешће проводе време и како изгледа њихов један дан и слично. Прикупљени одговори фокус-групе даље су разврстани у одређене категорије, које су послужиле као значајна смерница за формулисање одговарајућих питања. Израженост одређене активности добијена је одговором на питање да ли млади упражњавају одређену активност (да, не), а временска димензија одређена је питањем колико времена проводе у датој активности на недељном нивоу.

Ризично понашање се дефинише као добровољно понашање које прати постојање одређеног објективног и/или субјективног сте-

пена ризика (Стојадиновић, 2004, према Митровић, Смедеревац, Грујичић, & Чоловић, 2006) и то су сва она понашања којима се доводе у опасност властито здравље и угрожавају друштвене вредности. Ова варијабла је операционализована помоћу Скале за процену ризичног понашања (Scaag, 2009), која се састоји из две супске: понашање ризично по здравље и експлоративно понашање. У овом истраживању коришћена је само супскала понашања ризичног по здравље, која се састоји из 14 тврдњи. Коришћење само једне супске из одређене скале није неуобичајено код истраживача, нарочито уколико је супскала добрих психометријских карактеристика. На нашем простору скраћену верзију ове скале, тј. супскалу ризичног понашања, користила је Станојевић (2019) у опсежном истраживању на узорку адолесцената. Притом је супскала ризичног понашања показала добре психометријске карактеристике. Испитаници се изјашњавају о свакој тврдњи на четворостепеној скали (1 – никад; 2 – ретко; 3 – понекад и 4 – често). Скалом су обухваћена понашања попут ношења оружја, коришћења алкохола, коришћења марихуане, коришћења цигарета, упражњавања незаштићених сексуалних односа, али и размишљање о самоубиству, лагање и варање. Укупан скор понашања ризичног по здравље добија се једноставним сабирањем скорова са свих ајтема и креће се од 14 до 56. Поузданост супске је висока (Scaag, 2009), у овом истраживању износи 0,85 (Кронбах алфа коефицијент), што је исто као и у истраживању на узорку средњошколаца у Америци (Scaag, 2009). Социодемографске варијабле операционализоване су помоћу Упитника основних социодемографских карактеристика.

Узорак у истраживању су чинили испитаници, тј. адолесценти (N = 287), оба пола, и то 116 (40,4%) мушких и 171 женски испитаник (59,6%), од 15 година до 24 године, просечне старости 20,44 (AC = 20,44, СД = 2,75), који живе на територији Косова и Метохије. Адолесценција се одређује као процес биолошког и психосоцијалног сазревања, које се одвија у периоду од 10. до 24. године и дели се на рану (од 10. до 14. год.), средњу (од 15. до 19. год.) и касну (од 20. до 24. год.) адолесценцију. Подаци су обрађени у статистичком пакету SPSS 21 и притом су коришћене: дескриптивна статистика, корелациона и регресиона анализа, т-тест.

### *РЕЗУЛТАТИ И ДИСКУСИЈА*

У Табели 1 и Табели 2 приказана је израженост различитих врста провођења слободног времена код адолесцената и временска димензија структурираног и неструктурираног времена.

Табела 1. *Израженост различитих врста провођења слободног времена код адолесцената*

Слободно време		f	%	Слободно време		f	%
Вршњаци	да	263	91,6	Интернет	да	280	<b>97,6</b>
	не	23	8,0		не	7	2,4
Спорт	да	178	62,5	Позориште	да	31	<b>10,8</b>
	не	106	37,2		не	256	89,2
Свирање/певање	да	114	40,0	Читање књига	да	234	82,1
	не	171	60,0		не	51	17,9
Фолклор	да	47	16,4	Ленчарење	да	251	87,5
	не	239	83,6		не	36	12,5
Хоби	да	188	65,7	Гледање ТВ-а	да	231	80,5
	не	96	33,4		не	56	19,5
Кафићи	да	264	92,0	Шетња	да	265	92,3
	не	23	8,0		не	22	7,7
Играонице	Да	88	30,7	Волонтеризам	да	45	15,7
	Не	199	69,3		не	242	84,3

Легенда: ф – фреквенце, % – процент

У Табели 1 приказана је израженост различитих врста провођења слободног времена (структурисаног: бављење спортом и физичким активностима, певање и свирање, сценско-плесне активности (фолклор), хоби, позориште, читање књиге и волонтерски рад) и доколице (неструктурисаног: дружење са вршњацима, кафићи, играонице, Фејсбук, Твитер и остале друштвене мреже, шетња и лешкарење) код адолесцената. Добијени резултати показују да адолесценти најрадије бирају интернет (97,6%) као неструктурисану, а најмање позориште (10,8%) као структурисану активност.

Табела 2. *Израженост временске димензије структурисаног и неструктурисаног времена*

Н. ниво	С		ПС		Ф		П		Ч		Х		В	
	ф	%	Ф	%	ф	%	Ф	%	ф	%	ф	%	Ф	%
> од 1 ч.	32	17,2	53	44,9	17	34,0	7	21,2	44	18,6	54	28,3	16	37,2
1–5 ч.	86	46,2	29	24,6	20	40,0	22	66,7	121	51,3	86	45,0	15	34,9
6–10 ч.	51	27,4	16	13,6	4	8,0	3	9,1	53	22,5	34	17,8	6	14,0
< 10 ч.	17	9,1	20	16,9	9	18,0	1	<b>3,0</b>	18	7,6	17	8,9	6	14,0

Легенда: ф – фреквенција, % – проценти; Н. ниво – недељни ниво; С – спорт; ПС – певање/свирање; Ф – фолклор; П – позориште; Ч – читање; Х – хоби; В – волонтеризам

Табела 3. Израженост временске димензије структурираног и неструктурираног времена

Н. ниво	В		Иг.		Ш		Ин.		П		ТВ		Л	
	ф	%	Ф	%	ф	%	Ф	%	ф	%	ф	%	Ф	%
> 1 ч.	30	11,2	34	38,6	54	20,0	25	8,9	46	17,3	44	19,2	44	17,5
1–5 ч.	118	44,2	30	34,1	150	55,6	83	29,4	140	52,6	104	45,4	100	39,8
6–10 ч.	60	22,5	14	15,9	41	15,2	80	28,4	55	20,7	49	21,4	66	26,3
< 10 ч.	59	22,1	10	11,4	25	9,3	94	<b>33,3</b>	25	9,4	32	14,0	41	16,3

Легенда: ф – фреквенција, % – проценти; Н. ниво – недељни ниво; В – вршњаци; Иг. – играонице; Ш – шетња; Ин. – интернет; К – кафићи; ТВ – гледање ТВ-а; Л – ленчање

У Табели 2 и Табели 3 приказана је израженост временске димензије структурираног и неструктурираног времена, тј. колико времена испитаници проводе у датим активностима на недељном нивоу (изражено у сатима). Добијени резултати показују да адолесценти у највећем проценту (33,3%) више од 10 сати проводе на интернету, а само 3% њих проводи у позоришту.

Када је у питању утврђивање разлика у изражености структурираног и неструктурираног слободног времена и ризичног понашања, резултати т-теста показали су да нема статистички значајних разлика у структурираном и неструктурираном времену у односу на пол (Табела 4).

Табела 4. Т-тест за варијабле структурирано и неструктурирано слободно време у односу на пол испитаника

	АС		СД		т	ДФ	п
	Мушки	Женски	Мушки	Женски			
	пол	пол	пол	пол			
Структурирано слободно време	2,91	2,72	1,36	1,29	0,875	274	0,383
Неструктурирано слободно време	4,81	4,60	1,04	0,97	1,304	274	0,195

Легенда: АС – аритметичка средина; СД – стандардна девијација; т – вредност т-статистика; дф – степен слободе и п – вероватноћа.

Статистички значајне разлике у ризичном понашању добијене су у односу на пол испитаника (Табела 5)

Табела 5. Т-тест за варијаблу ризично понашање у односу на пол

	АС		СД		т	ДФ	п
	Мушки	Женски	Мушки	Женски			
	пол	пол	пол	пол			
Ризично понашање	26,27	22,28	7,81	6,22	4,53	274	<b>0,001</b>

Легенда: АС – аритметичка средина; СД – стандардна девијација; т – вредност т-статистика; дф – степен слободе и п – вероватноћа.

Приказани резултати показују да су испитаници мушког пола склонији ризичном понашању у односу на испитанице.

Резултати корелационе анализе показали су да постоји статистички значајна позитивна повезаност ризичног понашања и неструктурисаног времена код адолесцената ( $p = 0,257$ ;  $p < 0,01$ ), док повезаност ризичног понашања и структурисаног времена у овом истраживању није статистички значајна. Резултати корелационе анализе даље показују да постоји статистички значајна негативна повезаност година живота испитаника са структурираним ( $p = -0,173$ ;  $p < 0,01$ ) и неструктурираним временом ( $p = -0,146$ ;  $p < 0,05$ ), али не и са ризичним понашањем. Подаци показују да постоји статистички значајна корелација ризичног понашања и школског успеха код средњошколаца обухваћених истраживањем. Наиме, гори школски успех указује на већи ризик од ризичног понашања код средњошколаца ( $p = -0,391$ ;  $p < 0,01$ ). Код испитаника који студирају није добијена статистички значајна корелација ризичног понашања и просечне оцене остварене на студијама. Нису добијене ни статистички значајне корелације ризичног понашања са бројем чланова породице и редоследом рођења испитаника.

Резултати регресионе анализе за ризично понашање адолесцената приказани су у Табели 6.

Табела. 6. Регресиона анализа за зависну варијаблу ризично понашање

Предикатори	Ризично понашање		
	$R^2$	$\Phi$	$B$
Године	0,14	14,96***	0,10
Пол			-0,25***
Неструктурирано			0,25***

Легенда: Бета стандардизовани регресиони коефицијенти; \*\* $n < 0,01$ , \* $n < 0,05$ .

Резултати регресионе анализе показују да се ризично понашање адолесцената може предвидети са 14% варијансе, при чему се најбоље предвиђање може остварити на основу пола и неструктурисаног времена. Године живота испитаника нису дале значајан допринос у овом моделу.

## ДИСКУСИЈА

Резултати добијени у овом истраживању указују на то да адолесценти најрадије бирају интернет, затим кафиће, па следе шетња и „блејање” са вршњацима као неструктурисане активности и да притом у поменутих активностима проводе више од 10 сати недељно. Адолесценти најмање бирају позориште као структурисану активност, затим волонтеризам, па следи фолклор. Овај податак нам може указати на одређене ризике којима су адолесценти изложени, тј. раз-



војне погодности које су им услед претежно неструктурираног провођења слободног времена ускраћене. Наиме, резултати бројних истраживања показују да је учешће у структурираним активностима повезано са повећаним задовољством везаним за школу (Gilman, 2001), већим академским достигнућем (Fredricks & Eccles, 2006), смањеним ризиком од напуштања школе (Mahoney & Cairns, 1997), нижом стопом депресије (Mahoney, Schveder & Stattin, 2002). Затим, структуриране активности олакшавају психолошки раст и дозвољавају младима да буду активни у свом развоју (Larson, 2000) и истраживању сопственог идентитета (Fredricks, Alfeld-Liro, Hruda, Eccles & Ryan, 2002). С друге стране, резултати показују и да је време проведено у неструктурираним активностима у позитивној корелацији са девијантним понашањима (учешће у криминалним активностима, опасна возња, виши степен злоупотребе наркотика, конзумирање алкохола и слично) (Osgood, Wilson, O'Malley, Bachman & Johnston, 1996) и лошим академским успехом (Cooper et al., 1999). Уопштено гледано, потенцијалне могућности добијене од слободног времена насупротив потенцијалним ризицима са којима се сусрећу приписују се ниском степену структуре унутар активности (Kleiber, 1999). Барнет је утврдио (Barnett, 2006) да је за младе људи који су изложени већој толеранцији на досаду и оне који су били у бољој могућности да се забављају користећи њихово окружење постојала већа могућност да се баве здравим активностима и фитнес-активностима. Са друге стране, спољашње активности биле су приоритетније за оне који су испољавали особине особа које жуде за узбуђењем (сензацијом) и оне који су вероватније били склони досади. Међу сличним редовима, Iso-Ahola и Crowley (1991) у свом истраживању су пронашли везу између злоупотребе средстава зависности и досаде код младих.

У нашем истраживању се показало да структурирано време није значајно повезано са ризичним понашањем, што указује на то да се између структурираног слободног времена и ризичног понашања умеђу и неке друге варијабле, као што су особине личности, карактеристике менталног здравља депресивност и анксиозност, као и социјална подршка и други интерперсонални контексти које треба додатно испитати у наставку овог истраживања, али да је неструктурирано време значајно повезано и да је значајна предиктор ризичног понашања код младих.

Бројни радови говоре у прилог чињеници да су адолесценти мушког пола склонији делинквентном и агресивном понашању, конзумирању психоактивних супстанци, посебно алкохола и марихуане у односу на адолесценткиње (Buljan-Flander, Durman-Marijanović i Ćorić-Špoljar, 2007; Mihić i Bašić, 2008; Novak i Bašić, 2008; Lebedina-Manzoni, 2005, према Ricijaš, Krajcer i Bouillet, 2010.). Истраживања ризичног и делинквентног понашања адолесцената углавном показују значајне и конзистентне разлике у манифестацији те врсте понашања код дечака и девојчица. Код адолесцената се девијантно пона-

шање чешће манифестује кроз насилност, док су код девојчица чешћи ненасилни облици понашања (крађа, превара, проституција и друго) (Leadbeater, Kuperminc, Blatti & Hertzog, 1999, према Rizvan, 2013). Испитивање које је спроведено на узорку од 706 ученика виших разреда основних и средњих школа у Републици Хрватској показало је да су младићи статистички значајно склонији већини делинквентних понашања и ризичним, ненормативним понашањима од девојака. Међутим, резултати истог истраживања нису показали да постоје статистички значајне полне разлике код ризичних сексуалних понашања (Ručević, 2009, према Rizvan, 2013). Резултати добијени у овом истраживању потврђују претходнонаведено.

### ЗАКЉУЧАК

На основу добијених резултата и њиховог сагледавања у односу на друга истраживања из ове области, може се закључити да адолесценти на простору Косова и Метохије проводе углавном неструктурирано слободно време (доколицу) и да време проведено у овим видовима активности утиче на ризично понашање адолесцената. Имајући у виду да је адолесценција развојни период повећаног ризика за криминална и ризична понашања, те појаву различитих психопатолошких симптома (Stanojević, Radović & Jaredić, 2013; Videnović & Baucal, 2011), радом настојимо да скренемо пажњу на значај структурисања слободног времена адолесцената у циљу подстицања адекватног раста и развоја, уз неопходно ангажовање стручњака из различитих области, пре свих психолога и педагога. Код нас слободно време и даље се сматра временом за одмор од свакодневних обавеза, па самим тим није ни структурисано. У неким развијеним земљама, формира се цела мрежа педагошких делатности које су усмерене на решавање важних питања које поставља слободно време. У Шведској, на пример, издваја се око милион круна (12 милиона динара) за организовање слободног времена, за оснивање педагошких катедри чија би област била слободно време. Боље разумевање димензије слободног времена доприноси квалитету живота (појединачна, заједница и квалитету животу у непосредном социјалним окружењу), па је вероватније да ћемо се више ценити и вредновати, а самим тим и квалитетније користити слободно време (Henderson, 2010). Узевши у обзир резултате истраживања, како страних тако и домаћих истраживача, те резултате добијене у овом истраживању, можемо тврдити да је слободно време потребно посматрати као један од кључних контекста за учење, здравље младих људи, те простор за њихово самоостварење и партиципацију. Такође, треба осмислити начин да, иако користе један начин упражњавања слободног времена (нпр. интернет), тај начин користе за структурисане активности и учење, а не за играње игрица и друштвене мреже. Такође, и кафићи могу нудити другачије садржаје, као што су нпр. културни кутак у оквиру кафеа који могу младима омо-

гућити разне садржаје и омогућити развој њихових интересовања. Нарочито је важно структурисати слободно време адолесцената у услови-ма друштвене кризе, неповољне промене и услови у средини могу да интензивирају и промене уобичајене облике психопатологије или допринесу појави нових облика психопатологије или поремећаја понашања (Ћурчић, 2005). Исходи адолесценције, као кризног развојног периода, зависе од личне историје адолесцената, капацитета њиховог психичког апарата (Mladenović & Todorović, 2008), али и од услова у средини која их окружује (Minić, 2014). На струци је, али и на онима који су одговорни за одрастање младих родитеља и наставника, да осмисле структуру за уобичајене начине доколице и да то понуде младима за њихов што квалитетнији раст и развој.

**Захвалница:** Рад је резултат истраживања у оквиру пројекта ИИИ 47023 *Косово и Метохија између националног идентитета и евроинтеграција*, који финансира Министарство просвете, науке и технолошког развоја Републике Србије.

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## **STRUCTURED AND UNSTRUCTURED TIME AND RISKY BEHAVIOR OF ADOLESCENTS IN CONDITIONS OF SOCIAL CRISIS**

**Biljana Jaredić, Jelena Minić, Tatjana Radojević**

University of Priština, Faculty of Philosophy, Kosovska Mitrovica, Serbia

### **Summary**

The importance of leisure time management and its influence on the growth and strengthening of personality, still does not cease to intrigue the scientific public. There is a disagreement in the literature regarding developmental opportunities and benefits connected with structured and unstructured youth activities during their leisure time. With this research we will discover how adolescents spend, i.e. structure free time (structured and unstructured, i.e. free time and leisure) in conditions of actual social crisis.

The main objective of this research is to determine how much adolescents prefer certain types of structured free time and unstructured time (leisure time), as well as their connection with risky behavior of adolescents in social crisis. The sample consists of a number of adolescents ( $N = 287$ ), both male and female (116 or 40.4% of male and 171 or 59.6% of female respondents), ages 18 to 24, with the average age being 20.44 years ( $AS = 20.44$ ,  $SD = 2.75$ ) living in the Autonomous Province of Kosovo and Metohija. The Leisure and Leisure Assessment Questionnaire and the Basic Socio-demographic Characteristics Questionnaire and the Risk Behavior Rating Scale (RBRS) (Scaar, 2009) were used during this research. Data were processed by descriptive statistics, correlation and regression analysis and the T-test. The results obtained in this research showed that adolescents prefer the Internet as an unstructured activity, and they least prefer the theater as a structured activity. They spend more than 10 hours in these activities per week (such as the Internet, cafes, socializing with peers and walks). A negative correlation between age and structured and unstructured time was obtained, which indicates that adolescents have less free time (both free structured and leisure or unstructured time) as they grow up. Also, a negative correlation was obtained between academic success and risky behavior, which means that if adolescents achieve better results in academic careers, they have less propensity for risky behavior. Research showed that structured time is not significantly related to risky behavior, indicating that some other variables are inserted between structured leisure and risky behavior, which should be further examined in the continuation of this study. Also, unstructured time is significantly related to and a significant predictor of risky behavior for youth as a target. The results also indicate that boys are more prone to risky behavior than girls. Adolescent risk behavior can be predicted with 14% of variance (significant predictors are unstructured leisure time and gender of adolescents). Better understanding of leisure management can contribute to better life quality of individuals, community and to the immediate social environment. It is especially important to know the consequences of bad management of adolescent unstructured leisure time in the time of social crisis having in mind that changes and environmental conditions can intensify and change common forms of psychopathology or contribute to the emergence of new forms of psychopathology or other behavioral disorders.

## EGG DONATION: EXPLORING ATTITUDES OF STUDENTS TOWARDS DONATION

Jelena Opsenica Kostić\*, Milica Mitrović, Damjana Panić

University of Niš, Faculty of Philosophy, Niš, Serbia

### Abstract

Conception with donated oocytes represents an important option for overcoming sterility, but brings with it numerous dilemmas, which have been dealt with differently in various European countries. In the Republic of Serbia, anonymous oocyte donation is legal, and donors include women from the general population, and women undergoing IVF. This is a new phenomenon in our society, for which the law requires promotion. In order for the campaign to be appropriate, it is necessary to learn about existing attitudes. This research was carried out with the aim of determining the attitudes of students towards egg donation (N = 503; 206 young men, 297 young women). A questionnaire was used, designed based on the scale used by Swedish authors to study the attitudes of potential donors (Skoog-Svanberg, Lampic, Bergh, & Lundkvist, 2003). The obtained results indicate that there are generally positive attitudes towards oocyte donation, but that most respondents are reserved regarding the issue of propagating donors in the media. Most of the respondents are unsure regarding donation from IVF, and when asked about donor anonymity and the right of the child to learn its genetic origin, they showed signs of oscillating and supporting contradictory options. Even though this study was carried out on a student population, it is possible to identify significant guidelines for the start of the promotion of voluntary egg donation in RS, as well as implications for future research.

**Key words:** egg cell donation, attitudes towards donation, potential donors, donor promotion, students.

## ДОНИРАЊЕ ЈАЈНИХ ЋЕЛИЈА: ИСТРАЖИВАЊЕ СТАВОВА СТУДЕНАТА ПРЕМА ДОНИРАЊУ

### Апстракт

Зачеће помоћу донираних јајних ћелија представља значајну могућност превазилажења стерилитета, али доноси са собом и неке дилеме, које су различито решене у европским земљама. У Републици Србији је дозвољено анонимно добровољно дони-

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\* Аутор за кореспонденцију: Јелена Опсеница Костић, Филозофски факултет, Тирила и Методија 2, 18000 Ниш. Србија, [jelena.opsenica.kostic@filfak.ni.ac.rs](mailto:jelena.opsenica.kostic@filfak.ni.ac.rs)

рање ооцита, а донори могу бити жене из опште популације и жене укључене у ВТО процес. Ово је нов феномен у нашем друштву, за који и сам закон предвиђа промоцију. Да би кампања била одговарајућа, неопходно је упознати актуелне ставове. Ово истраживање спроведено је у циљу истраживања ставова студената према донирању јајних ћелија (N = 503; 206 младића, 297 девојака). Употребљен је упитник направљен по угледу на скалу шведских аутора за испитивање ставова могућих донора (Skoog-Svanberg, Lampic, Bergh, & Lundkvist, 2003). Добијени резултати показују да, уопштено гледано, постоје позитивни ставови према донирању ооцита, али је већина испитаника резервисана по питању пропагирања донора у медијима. Већина испитаника има и недоумице у вези са донирањем из ВТО процеса, а приликом испитивања анонимности донора и права детета да сазна своје порекло испитаници подржавају супротстављене опције. Иако се ради о истраживању спроведеном на студентској популацији, могуће је извдојити значајне смернице за почетак промоције добровољног давалаштва јајних ћелија у Републици Србији, као и импликације за будућа истраживања.

**Кључне речи:** донирање јајних ћелија, ставови према донирању, могући донори, промоција донирања, студенти.

## INTRODUCTION

Fertility (the average number of children that a woman gives birth to during the reproductive period of her life) is significantly decreasing in developed and developing countries. The fertility rate in the EU in 2017 ranged from 1.26 (Malta) to 1.90 (France), averaging at 1.59 (Eurostat, 2019). The fertility rate in Serbia is within this range – 1.5 in 2018 (Republic Institute for Statistics, 2019). For simple population growth, a rate of 2.1 is needed; lower values represent a decline in the population. In part, this is due to the modern lifestyle, which is contrary to the requirements of delivering and raising a larger number of children. Higher levels of education and a professional career lead many women to have children later in life, which could be linked to difficulty conceiving (Stöbel-Richter, Goldschmidt, Brähler, Weidner, & Beutel, 2009; Nargund, 2009). More serious problems with fertility can be found among 10% of all couples, and roughly 5% of them will be *involuntarily childless* (Gnoth et al., 2005). For many countries worldwide, encouraging births and increasing options for couples who are having difficulty conceiving represent an important part of their internal policy. Assisted Reproductive Technologies (ARTs) offer couples with fertility issues multiple options – and one of them is the possibility of conceiving with donated eggs.

### *Egg Donation and Donors*

Oocyte donation is a 'third party' infertility treatment (ESHRE fact sheets 3, 2017), or the inclusion of 'reproductive others' (Freeman, Graham, Ebtehaj, & Richards, 2014), akin to sperm and embryo donation, and surrogate motherhood. The donated eggs are needed by women who cannot produce their own eggs or are at a high risk of transmitting genetic conditions (ESHRE fact sheets 3, 2017). Egg donation (ED) is a more complex and in-



vasive procedure than sperm donation. A woman who would like to be a donor must take hormone therapy and undergo aspiration – egg cell extraction. These cells will be fertilized with the sperm of the intended mother's partner, and the embryo then transferred. This is the process of in vitro fertilization (IVF), with the exception that the woman providing the egg (the donor) is not the same woman receiving the embryo (the intended mother). ED allows intended mothers to experience pregnancy and give birth to a child which is genetically not theirs. It is not easy to determine how many women require ED for pregnancy. Studies have shown that 6–15% of women in their reproductive period have trouble conceiving (Ceballo, Abbey, & Schooler, 2010; Gnoth et al, 2005; Petz, Janic, & Craig, 2016; Stanford, 2013). However, the reasons for infertility are numerous and not necessarily related to the quality of the eggs, or the reproductive health of the woman. An estimate can be made based on ESHRE data (The European Society of Human Reproduction and Embryology) for 28 European countries, which indicate that of the roughly 500 000 cycles of IVF carried out in Europe in 2013, 39 000 were treatments which included donated eggs (Andersen, et al., 2007; ESHRE fact sheets 3, 2017). The data indicate that in roughly 8% of all IVF cycles, the use of donated eggs was necessary. Still, we cannot completely rely on this estimation, since in six of the countries donation was not legal, and the data only included couples who managed to obtain a donated egg.

ED is not legal in all European countries: it is illegal in Germany. Some countries allow ED with donor anonymity (France, Greece, Hungary, Italy, Poland, Portugal, Slovenia, and Spain), or with non-anonymous donors who are open to contact when the child comes of age (Austria, Finland, Holland, Sweden, and the United Kingdom). In Serbia, the Law on Biomedically Assisted Fertilization (BMAF)<sup>1</sup> was passed in 2017 (Official Gazette of RS, 40/2017) requiring donors to be anonymous (Articles 55–57). Countries also differ based on the compensation the donor can receive. France allows (only) compensation of the actual expenses incurred during the donation process, a model included in our own laws. “It is strictly prohibited to offer, or provide reproductive cells as gifts, i.e., embryos, to procure monetary or any other type of gain.” (Article 32, Section 1, BMAF).

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<sup>1</sup> The law is still not being practiced, since until April 2019, a set of guidelines had still not been provided for detailed regulation of gamete donation (nine rulebooks published in the Official Gazette of RS, 27/2019, available at: <http://www.pravno-informacioni.sistem.rs/SIGlasnikPortal/eli/rep/sgrs/ministarstva/pravilnik/2019/27/>). A reproductive cell bank opened on May 21, 2019 at the Clinic for Gynecology and Obstetrics of the Clinical Center of Serbia (Belgrade). Even though this is important and encouraging news for couples who cannot bring a pregnancy to term without a donated oocyte, it happened that donors were not visiting the bank. It would seem that there is still some lack of clarity regarding the procedure and not much has been done to make ED (or sperm and embryo donation) more relatable to the wider public and potential donors.

The donor expenses that are covered are related to temporary absence from work, the cost of transport related to the donation process, and compensation for ‘excessive damage’ which could be incurred on the part of the donor during the process (Article 32). There are researchers who consider financial compensation to be the best means of ensuring a satisfactory number of available cells, since the demand constantly outweighs the supply (Bayefsky, DeCherney, & Berkman, 2016; Shapiro, 2018). In Europe, Spain provides the greatest financial compensation (roughly 1000e), and is the country with the largest number of egg donors: as many as 50% of all the donations made in Europe (Pavone, 2018). These donors are anonymous - the employees of Spanish IVF clinics think that revoking anonymity would have a negative impact on the number of donations (Pavone, 2018). But, even if the donor is anonymous, the recommendation is that the parents not hide any information related to the specificities of conception from the child (Ethics Committee of the American Society for Reproductive Medicine, 2013; Golombok, 2015; Pasch, 2018).

There are different types of donors (Purewal & van der Akker, 2009a), such as patient-donors – individuals taking part in IVF who for some reason decided to donate their reproductive cells or unused embryos. Compensation for donors differs – from completely voluntary materially non-compensated donation, to compensation, or a discount in the price of their own IVF procedure. Non-patient donors are usually known<sup>2</sup>, commercial, voluntary, and potential (Purewal & van den Akker, 2009a). In Serbia, ED will be possible for IVF patients without compensation, and good-will donors (where, by definition, compensation is not included). All healthy individuals in their reproductive periods can be viewed as potential donors. *Egg sharing* is a particularly complex topic due to the aforementioned discount in the price of the IVF process. The positive aspect of finding a donor this way is that healthy women are not exposed to (unnecessary) hormone therapy (Simons & Ahuja, 2005); however, there are issues related to egg sharing, including non-medical ones such as donors regretting their decisions; circumstances which prevent the female patient – potential donor from giving valid voluntary consent; and the transformation of a reproductive cell into merchandise that can be traded (Blyth & Golding, 2008).

Facts pertaining to the donation process and donors in general need to be presented to the broader public in a comprehensible, adapted form to help

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<sup>2</sup> Known donors are individuals who decide to donate to a couple they are acquainted with (friends, relatives). However, their reproductive cells will not be given to that couple, but another couple undergoing IVF, for whom the donor will actually be anonymous. The benefit to the couple who provided the donor is their being moved up to the top of the list for a donation. This type of donation is referred to as known donation, since the individuals decided to donate to help a couple with whom they have close ties. (Thus, these are not non-anonymous donors, which is a variation of commercial donation.)

shape attitudes based on scientific facts. Sadly, research indicates that knowledge of ED is quite limited, especially in the population of individuals who do not have fertility issues (Baykal, Korkmaz, Ceyhan, Goktolga & Baser, 2008; Chliaoutakis, Koukouli, & Papadakaki, 2002; Isikoglu et al., 2006; Khalili, Isikoglu & Ghasemi, 2006; Straehl, Lara, Sa, Reis, & Rosa, 2017); university education is not related to better familiarity with the donation process, nor issues of fertility in general (García, Vassena, Trullenque, Rodríguez, & Vernaev, 2015). Lack of knowledge of ED is one of the more significant factors which drives people away from donation (Gezinski, Karandikar, Carter & White, 2016; Stevens & Hayes, 2010).

### *Attitudes Towards ED*

The social and psychological factors which determine donation are of great importance for clinics, lawmakers, and campaigns. For future parents, potential donors and the future environment of the child to accept this option, research should first focus on the attitudes towards ED, and then, through a carefully designed campaign, support the positive attitudes and work on correcting the negative ones. This activity, defined as the “promotion of the voluntary donation of reproductive cells” is included in the BMAF (Article 48); however, national research into these issues is scarce, so we refer international research results which refer to the general population and potential donors.

A new review study (Platts et al., 2019) on attitudes towards ED among potential donors and the general population sums up the results of 39 studies. Only 8 studies used a previously constructed validated instrument, as attitudes towards ED can be studied with a set of questions which the researchers consider relevant for the given environment in the given moment. The respondents in the selected studies express positive attitudes towards ED; however, the percentages differ and range from 50,8 to 91,8 (Platts et al., 2019). The attitudes regarding whether parents should inform their child of its genetic origin were also mostly positive (Platts et al., 2019). However, there are also studies where the respondents mostly indicated that a child should never learn anything about the conception: for example, a study in Turkey (Isikoglu et al., 2006) and Iran (Khalili et al., 2006). The same review study indicates that there is no clear consensus regarding the anonymity of the donors and the potential contact between the donor and the child.

The research of Purewal and van der Akker (2009b) focused on the attitudes and intentions for voluntary ED and included 349 women (non-patients), average age 27,8 years. One-third of them indicated a readiness for non-anonymous ED, which is a legal option in GB where the study was carried out. The results indicated that marital, socio-economic and professional status are not related to readiness to donate; women who expressed their readiness to donate were older, had experienced miscarriages more of-

ten, and were less educated (compared to those unwilling to donate their eggs). Potential donors – women aged 25 to 30 – were the focus of a Swedish study at a time when that option became legal in that country (Skoog-Svanberg, Lampic, Bergh, & Lundkvist, 2003a). 17% of them were ready to consider ED, 39% were against, 44% were doubtful. One-third did not think that the child should learn the identity of the donor, but a similar number indicated that they would be happy if the child would contact them in the future (Skoog-Svanberg et al., 2003a). An adapted version of the questionnaire was used in our study. The authors also compared the responses of men and women (Skoog-Svanberg, Lampic, Bergh, & Lundkvist, 2003b). On a sub-scale of the attitudes on ED in general, women were more willing to support donating/receiving eggs, but when evaluating the claim “Egg donation is a good way to help childless couples” there was no difference between men and women (see Table 1). Although Platts et al. (2019) indicated to consensus regarding the issue of donor anonymity, among the Swedish respondents, both men and women expressed agreement with the claim a child should find out its genetic origins, and that parents should be honest with the child; they did not oscillate in their responses to the claim that parents should decide whether to tell their child and if it will disrupt the parent-child relationship – they mostly disagreed with these claims (for the formulation of the items and our results please see Table 3). Clearly they had a consistent attitude, even though ED had only recently become legal in their country. However, Sweden had for years practiced insemination via a sperm donor, and in 1984 ratified a law that children conceived in such a way had the right to learn the identity of the donor (Skoog-Svanberg et al., 2003b), thus they knew about gamete and non-anonymous donors.

A public opinion survey in the USA (Lee, Farland, Missmer, & Ginsburg, 2017) indicated that 16% of the respondents consider egg and sperm donation unacceptable (4% do not accept IVF as a treatment); 80% were in favor of gamete donation, while 90% from this last group considered that donors should be provided with financial compensation. A study carried out on a student population, also in the US (Lester, Furnham & Salem, 2010), indicated that more than 90% of the respondents approve of egg and sperm donation – which is somewhat higher than in the general population. The second study carried out on a student population in the US (Stevens & Hayes, 2010) showed that 23% of the respondents considered donating their own egg cells, while 43% stated there were not ready for that option.

This research was carried out with the aim of determining the attitudes of students and the possible differences between young women and men towards: a) ED in general; b) some specific circumstances regarding donation; and c) openness related to the child’s genetic origin. Even though the study was carried out on a suitability sample, the results could be a good starting point for planning a promotional campaign. The im-

portance of the population from which the sample was extracted is explained in the Discussion.

## METHOD

### *Sample and Procedure*

The sample of respondents consisted of 503 students of the University of Nis, 206 young men and 297 young women (aged from 18 to 27;  $M = 20.57$ ,  $SD = 1.41$ ). The research was carried out in various faculties in the spring of 2019. The respondents were informed about the goals of the study, and gave their oral consent to participate in the research. They were informed that they could, at any time, without explanation, refuse to complete the questionnaire.

### *Measures*

At the very beginning of the questionnaire, a short text was provided which informed the respondents that there is a law which allows gamete donation in the RS, to ensure that they understood that this was an actual possibility of overcoming infertility in Serbia. They then indicated whether they had previously been aware of the existence of such a law, while young women also answered the question about willingness to donate oocyte.

An attitude scale was provided on ED, based on the scale designed by a group of Swedish authors to study egg donation (Skoog-Svanberg, Lampic, Bergh, & Lundkvist, 2003). The content of the items was adapted to the general population: detailed knowledge of the donation process, or IVF, was not assumed based on the research context. The scale had three sections: attitudes on ED in general; an estimation of the specific circumstances regarding donation; and attitudes towards openness, or keeping secrets regarding the child's genetic origin. Data analysis included descriptive statistics, which is rare in opinion surveys regarding ED (Baykal et al., 2008; Gezinski et al., 2016; Kenney & McGowan, 2010; Khalili, et al., 2006; Isikoglu et al., 2006; Lee et al., 2017; Skoog-Svanberg et al., 2003a; Skoog-Svanberg et al., 2003b; Stöbel-Richter et al., 2009; Thaldar, 2020). The study of the metric characteristics of the scale using an internal consistency method at this point is inapplicable, since there is a notable oscillation in the attitudes. This is understandable since the phenomenon is new for the respondents – there was no time to form a consistent attitude. The issue will be discussed in the Discussion.

## RESULTS

25,7% of the young men 39,1% of the young women indicated they knew of the BMAF. Roughly 30% of them stated that they would

donate their own eggs; 15% refused that possibility; the remaining young women opted for the *I am not sure* option.

Table 1 indicates that most of the respondents had positive attitudes towards ED (items 1, 2 and 5). They do not think that a couple should remain childless if they cannot have their own children (item 4). Item 3 studies the attitude towards the second option which is available to couples – adoption. All of the responses of the young women and men differ significantly; the young women indicate a greater openness towards the option of donation.

Table 1. Attitudes toward ED in general

Item	Offered responses*	Young men	Young women	Significance of the difference
		N 206	N 297	
		Percentage	Percentage	$\chi^2$ test
1. If my friend/acquaintance wanted to donate her eggs, I would support her decision.	1	71,4	87,5	$\chi^2=19,99$ $df=3$ $p=.000$
	2	22,3	8,1	
	3	2,9	2,7	
	4	3,4	1,7	
2. If my friend/acquaintance wanted to get donated egg cells, I would support her decision.	1	69,4	86,5	$\chi^2=23,20$ $df=3$ $p=.000$
	2	22,3	6,7	
	3	5,8	3,4	
	4	2,4	3,4	
3. If a couple is infertile, adoption should be their first choice.	1	35,0	23,9	$\chi^2=29,07$ $df=3$ $p<.01$
	2	35,4	47,1	
	3	18,4	15,2	
	4	11,2	13,8	
4. If you cannot have children of your own, then you should not have children at all.	1	3,9	2,7	$\chi^2=10,62$ $df=3$ $p=.001$
	2	9,2	2,0	
	3	79,1	90,2	
	4	7,8	5,1	
5. Egg donation is a good way of helping couples without children.	1	71,4	85,2	$\chi^2=16,45$ $df=3$ $p=.000$
	2	14,6	7,1	
	3	8,3	2,0	
	4	5,8	5,7	

\* The following responses were offered: 1 = I agree; 2 = I neither agree nor disagree (I am neutral); 3 = I disagree; 4 = I cannot form an opinion.

Table 2 shows the frequency of the responses and differences in terms of gender in evaluating some specific circumstances related to donation. No responses are favored by most of the respondents at a rate of 70–80 or even 90%, results similar to those in Table 1. Since we are dealing with attitudes which are significant for the success of the donation campaign, they will be analyzed further in the Discussion.

Table 2. An evaluation of the specific circumstances related to ED

Item	Offered responses*	Young men	Young women	Significance of the difference
		N 206	N 297	
		Percentage	Percentage	
6. Women undergoing IVF should be asked to donate the cells which remain unused.	1	30,1	24,9	$\chi^2 = 8,52$ $df = 3$ $p < .05$
	2	34,0	27,6	
	3	13,6	13,5	
	4	22,3	34,0	
7. Women who would like to undergo sterilization (tubal ligation) should be asked to donate their eggs before the procedure.	1	48,5	55,6	$\chi^2 = 12,06$ $df = 3$ $p < .01$
	2	29,6	17,5	
	3	8,3	7,1	
	4	13,6	19,9	
8. Donor propagation in the media is a good way of recruiting women for ED.	1	30,1	37,9	$\chi^2 = 10,73$ $df = 3$ $p = .01$
	2	43,7	30,3	
	3	12,1	11,4	
	4	14,1	18,5	
9. A woman who donates her eggs and the couple who will receive them should remain anonymous and unknown to one another.	1	39,8	27,6	$\chi^2 = 8,54$ $df = 3$ $p < .05$
	2	29,1	34,0	
	3	18,9	21,9	
	4	12,1	16,5	
10. The egg donor should have some form of relationship (that of a friend/cousin) with the couple getting the egg.	1	15,0	10,4	NS $(\chi^2 = 7,39)$ $df = 3)$
	2	42,7	38,0	
	3	32,0	34,0	
	4	10,2	17,5	
11. Only women under the age of 43 should be allowed to receive donated eggs.	1	25,7	20,2	NS $(\chi^2 = 5,99)$ $df = 3)$
	2	27,7	22,2	
	3	32,5	39,1	
	4	14,1	18,5	

\* The following responses were offered: 1 = I agree; 2 = I neither agree nor disagree (I am neutral); 3 = I disagree; 4 = I cannot form an opinion; NS = the difference is not statistically significant.

Table 3 shows the current attitudes of the respondents towards keeping the child's genetic origin secret i.e., donor anonymity. Both the young women and men express different attitudes – namely, between the rights of the child (items 12, 15 and 17), the rights of the parents to decide whether or not to reveal the circumstance of conception (13), and the prevention of conflicts this knowledge could bring (14 and 16).

*Table 3. Attitudes towards openness, or keeping secret the child's genetic origin*

Item	Offered responses*	Young men	Young women	Significance of the difference
		<i>N</i> 206	<i>N</i> 297	
		Percentage	Percentage	
12. Children conceived with the help of a donor have the right to learn their genetic origin (that is, who the donor is).	1	57,3	57,6	NS ( $\chi^2 = 1,321$ $df = 3$ )
	2	23,8	20,5	
	3	7,3	7,4	
	4	11,7	14,5	
13. Parents should decide whether (or not) to reveal to their children what their genetic origin is.	1	41,7	43,4	NS ( $\chi^2 = 1,925$ $df = 3$ )
	2	28,2	25,6	
	3	21,8	19,5	
	4	8,3	11,4	
14. It is in the best interest of the child to never be provided with information on its genetic origin.	1	16,0	10,4	NS ( $\chi^2 = 4,174$ $df = 3$ )
	2	30,1	29,3	
	3	40,3	46,8	
	4	13,6	13,5	
15. When it becomes an adult, the child will have the right to learn the identity of its donor.	1	62,1	67,3	NS ( $\chi^2 = 6,914$ $df = 3$ )
	2	22,3	13,8	
	3	6,8	6,7	
	4	8,7	12,1	
16. The relationship between the parents and the child can be compromised if the child finds out its genetic origin.	1	23,3	24,2	NS ( $\chi^2 = 2,172$ $df = 3$ )
	2	40,8	35,4	
	3	23,3	28,3	
	4	12,6	12,1	
17. The parents should be honest with their children regarding their genetic origin.	1	55,3	65,3	$\chi^2 = 9,262$ $df = 3$ $p < .05$
	2	27,7	17,5	
	3	6,8	4,7	
	4	10,2	12,5	

\* The following responses were offered: 1 = I agree; 2 = I neither agree nor disagree (I am neutral); 3 = I disagree; 4 = I cannot form an opinion; NS = the difference is not statistically significant.



## DISCUSSION

Increase in fertility by assisted reproduction is an important issue in many countries. Serbia allowed the use of donated gametes in 2017 and then in 2019 (however, this is not yet possible in practice). A shortage of oocytes is expected, and the study focused on the attitudes towards ED. To determine if the respondents consider ED a realistic possibility in the RS, we first provided information on the law itself, and evaluated if they had been aware of it – most had not. The situation may have changed slightly, as the media have reported on the opening of a gamete bank. The change is not considered significant, since the law received media coverage. The population from which the sample was extracted is significant for the practice of gamete donation: they represent potential donors, and are the potential carriers of positive attitudes in the community and long-term environment of couples who require a donation. Informing them about donation will require more than news channels. During the study – prior to the promotion of donation – one-third of the female students stated that they would be ready to donate their eggs. These findings are in agreement previous ones (Purewal & van der Akker, 2009b; Stevens & Hayes, 2010; Skoog-Svanberg et al., 2003a; Skoog-Svanberg et al., 2003b).

The basic research problem was the analysis of students' attitudes towards ED. The study was carried out on a suitable sample which is not representative of the entire population, but is significant for the success of donation. The obtained data are significant for the establishment of adequate goals of future campaigns. Since we are dealing with a new phenomenon, unfamiliar to the respondents, the attitudes towards it could not be fossilized. This provides a greater possibility for shaping attitudes, but could also be unfavorable – if the public primarily or frequently encounters negative information regarding donation, their attitudes will sway in that direction. When it comes to supporting donation as opposed to supporting adoption (items 1, 2 and 5 as opposed to item 3, Table 1), it should be said that qualitative research of couples who have difficulty conceiving indicates that they frequently opt for what enables them to (at least in part) have a biological connection with the child (Golombok, 2015), seeking out an option which is closest to the 'natural' one. This should be expected, as 'blood' kinship ties are something that people attach a lot of importance to (Freeman et al., 2014). However, a campaign which supports donation should not at the same time discourage adoption. Both options should be supported, which is likely what our respondents also thought. In general, the students are ready to support egg donation (roughly 70% of the young men and close to 90% of the young women); only a proportionally small number expressed an unambiguously negative attitude. These findings are close to the upper range of support shown for donation (Platts et al., 2019) and are an indication that a campaign aimed at future donations and spreading positive attitudes in the environment could have a positive impact, since

the results pointed out current existence of positive attitudes. The young women were more ready to support ED compared to young man. Differences in terms of gender were also obtained in a study carried out on a sample of young adults (Skoog-Svanberg et al., 2003b). Perhaps the claims provoked greater empathy and solidarity with a woman who requires such a donation among the female respondents. This result is encouraging in the sense of donor recruitment, but does not mean that young men, or men in general, should be neglected in this campaign. They are partners and members of the environment which should support donation, and messages calling to action must be aimed at both women and men.

The respondents were also asked to express their attitudes to some specific circumstances regarding donation (Table 2). There were no preferred responses, except for the second item – roughly one half believe that women who opt for tubal ligation should be asked beforehand if they would like to donate their eggs. Special attention should be paid to the attitudes pertaining to items six and eight. Only one-third of the young men and one-fourth of the young women in the sample think that women undergoing IVF should be asked to donate their unused eggs. The law does allow voluntary donors and patient donors; since offering/accepting payment is not allowed, it is necessary to maximize the chances which are available. This means building a positive attitude towards donation from the IVF process. In light of the greater empathy towards women who are having difficulty conceiving, perhaps the young women do not agree as much with asking for donations from patients, since that could cause additional stress. ‘Egg sharing’ is an option that experts are divided on, as was explained in the Introduction (Blyth & Golding, 2008). It will be a challenge for the campaign to point out the invaluable help which donation offers, but without creating a sense of guilt among women undergoing IVF who do not want to share their eggs. In the case of the item eight, propagating donors in the media, (only) one-third of the young men and slightly more of the young women expressed their agreement. The lack of certainty on this issue can be seen as a sign of the lack of confidence in ‘advertising’ gamete donation. This is understandable, since it illustrates a situation in which an egg is a type of merchandise. It will be necessary for the videos in the campaigns not to resemble familiar advertisements, but short life stories. Items 9 and 10 show oscillations among the respondents regarding the anonymity of the donors; more young men than women agree that both the donor and the couple should remain anonymous to each other (roughly 40% of the young men, slightly less than 30% of the young women; with a significant percentage of the “I neither agree, nor disagree” option). A little over one-third do not agree that the donor and couple should become friends; but there were quite a few neutral responses here. The issue is a very complex one. Today, the predominant attitude is that the child has the right to find out the identity of the donor, and numerous European countries, which had previously begun the donation process, are abolishing donor anonymity.

Serbia has yet to go down the road of accepting donation, so there is currently more sense in supporting anonymity prescribed by law. Even in a country where non-anonymous sperm donation existed prior to the introduction of egg donation, close to 50% of men and women agreed that an egg donor and the couple should remain anonymous to each other (Skoog-Svanberg et al., 2003b).

Another complex issue is keeping identities secret as opposed to the right of the child to learn its genetic origin and the identity of the donor. The respondents' answers varied here, attempting to support both the choice of the parents (item 13) and the rights of the child (items 12 and 15). The idea that parents should be honest regarding genetic origin (item 17) is supported by 55% of the young men and 65% of the young women – the percentages are most likely not greater due to the fear that the relationship between the parents and child will be compromised (item 16). It is absolutely *not* in the best interest of the child to never get access to information regarding its genetic origin (Ethics Committee of the American Society for Reproductive Medicine, 2013; Golombok, 2015; Pasch, 2018), which is currently recognized by a little less than half of the respondents, with one-third undecided (item 14). In an essentially similar claim, worded differently, we have a greater percentage of agreement – between 60 and 70% agree that the child has the right to find out the identity of its donor (item 15). However, this right and the best interest of the child are not recognized by the BMAF at the moment, since donor anonymity is required. The wider public should see that such an option is a valid choice in the beginning, with the idea that it should be overcome in the future; parents should certainly be supported in their openness towards their child, irrespective of whether donor identity can be revealed.

The results obtained from this student population should be studied on samples from other populations as well. However, it is still possible to provide some guidelines for the first steps in promoting voluntary ED. Attitudes towards egg donation are generally positive – which is a very good start, but there are clear indications which specific attitudes attention should be focused on. The first step should be the realization of a positive attitude towards the campaign itself – not as an advertisement for cell trade, but a possibility for a woman to give another woman a priceless gift – the gift of motherhood. Rendering the option of donation from IVF, or egg sharing, more relatable should be done very carefully. The goal is not to create added pressure on women who are already in a stressful situation. “You can spread joy”, “You can give hope” would be the type of slogan which is clear enough, positive and which provides the option to choose. If the campaign successfully creates an image of donors as exceptional people who took a great step – which is true - parents will find it easier to be open towards their children, and children due to the specific nature of conception will not be shunned in their environment.

The potentially most sensitive part of the promotion is bridging the gap between donor anonymity and the rights of the child.

It would be good for upcoming research to include the attitudes of other age and social groups, to better define the goals and messages of the campaign. Existing knowledge and attitudes of reproductive health and the donation process is worth studying, since their important positive, as well as negative effect to voluntary donation.

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## ДОНИРАЊЕ ЈАЈНИХ ЋЕЛИЈА: ИСТРАЖИВАЊЕ СТАВОВА СТУДЕНАТА ПРЕМА ДОНИРАЊУ

Јелена Опсеница Костић, Милица Митровић, Дамјана Панић  
Универзитет у Нишу, Филозофски факултет, Ниш, Република Србија

### Резиме

Донирање јајних ћелија је поступак потпомогнуте репродукције који укључује тзв. репродуктивне друге у процес зачећа. Донацијом ооцита се могућности превазилажења стерилитета повећавају, али донирање повлачи са собом и неке дилеме, које су различито решене у европским земљама. У Републици Србији дозвољено је анонимно добровољно донирање ооцита, а донори могу бити жене из опште популације и жене укључене у ВТО процес. Закон изричито забрањује стицање финансијске користи од донирања – донори добијају само компензацију реалних трошкова и, евентуално, накнаду „прекомерне штете” настале током процеса. Ово је нов феномен у нашем друштву, за који и сâм закон предвиђа промоцију. Да би кампања била одговарајућа, неопходно је упознати актуелне ставове. Ово истраживање спроведено је у циљу истраживања ставова студената према донирању јајних ћелија (N = 503; 206 младића, 297 девојака). Популација младих којој узорак припада је вишеструко

значајна за успостављање праксе донирања гамета: они представљају и могуће доноре и могуће носиоце позитивних ставова у заједници, као и дугорочно животно окружење парова којима је донација потребна. У истраживању је употребљен упитник направљен по угледу на скалу шведских аутора за испитивање ставова могућих донора (Skoog-Svanberg, Lampic, Bergh, & Lundkvist, 2003). Добијени резултати показују да, уопштено гледано, постоје позитивни ставови према донирању ооцита, али је већина испитаника резервисана по питању пропагирања донора у медијима. Већина испитаника има и недоумице у вези са донирањем из ВТО процеса, а приликом испитивања анонимности донора и права детета да сазна своје порекло, испитаници показују колебање, односно подржавају супротстављене могућности. Иако се ради о истраживању спроведеном на студентској популацији, могуће је издвојити значајне смернице за почетак промоције добровољног донирања јајних ћелија у Републици Србији. Чини се да први корак треба да буде стварање позитивног става према самој кампањи – то није реклама за трговину ћелијама, то је представљање могућности за непроцењиви дар који жене могу дати другим женама – дар мајчинства. Требало би приближити могућност донирања из ВТО процеса, односно дељење јајних ћелија, али врло опрезно, јер циљ није стварање додатног притиска на жене које се већ налазе у стресној ситуацији. „Можеш да поделиш радост”, „можеш да даш наду” био би тип слогана који је довољно јасан, позитиван и оставља могућност избора. Уколико промоција успе да створи слику о донорима као изузетним људима који су се одлучили на велики корак – што јесте истина, родитељима ће бити лакше да буду отворени према деци, а деца због специфичног начина зачећа неће бити одбачена у средини, тј. били би усмерени и ти ставови. Вероватно најосетљивији део промоције је усаглашавање анонимности донора са правима детета. Било би добро да истраживања у наредном периоду обухвате ставове других узрасних и друштвених група, ради бољег дефинисања циљева и порука кампање. Вреди истражити и знање о репродуктивном здрављу и процесу донирања, јер и то може бити озбиљна препрека добровољном давалаштву јајних ћелија.





## REPRODUCTIVE HEALTH OF VISUALLY IMPAIRED WOMEN

Branka Jablan<sup>1\*</sup>, Marta Sjenčić<sup>2</sup>

<sup>1</sup>University of Belgrade, Faculty for Special Education and Rehabilitation,  
Belgrade, Serbia

<sup>2</sup>Institute of Social Sciences, Belgrade, Serbia

### Abstract

Results of numerous studies emphasize insufficient system efficacy in the realization of reproductive rights of women with disabilities. These women usually claim that the services related to this area are often unreachable and inaccessible, that they lack the information on reproductive health in the necessary form, that they encounter stereotypes and prejudices related to their sexuality and their realization in the role of a partner in a relationship and marriage. Visually impaired women are especially sensitive to this topic. Therefore, it often happens that they ignore certain health problems, contact the gynecologist too late, which can lead to late diagnosis. One of the impressions is also that the level of their knowledge about reproductive health increases with the number of their interactions and informal education through mass media.

The aim of this paper is to depict the existing international and national normative frame which regulates the reproductive health of women with disabilities and to emphasize the problems related to the reproductive health of visually impaired women. It will also provide recommendations for amendments of the national normative frame.

**Key words:** reproductive health, women with disabilities, visually impaired women.

## РЕПРОДУКТИВНО ЗДРАВЉЕ ЖЕНА СА ОШТЕЋЕЊЕМ ВИДА

### Апстракт

Резултати бројних студија указују на недовољну ефикасност система у остваривању права на бригу о репродуктивном здрављу жена са инвалидитетом. Оне најчешће наводе да су им услуге из овог подручја често недоступне, неприступачне, да им недостају информације о репродуктивном здрављу у одређеном формату, да су присутни стереотипи и предрасуде када је у питању њихова сексуалност и оствари-

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\* Аутор за кореспонденцију: Бранка Јаблан, Универзитет у Београду, Факултет за специјалну едукацију и рехабилитацију, Високог Стевана 2, 11000 Београд, Србија, [jablanb@vektor.net](mailto:jablanb@vektor.net)

вање у улози партнера у вези и браку. Жене са оштећењем вида су посебно осетљиве на ову тему, тако да се дешава да одређени здравствени проблем игноришу, касно се јаве гинекологу, што доводи до тога да се дијагноза болести често не постави на време. Стиче се и утисак да ниво њиховог знања о репродуктивном здрављу расте са порастом њихових интеракција и неформалном едукацијом путем мас-медија. Циљеви овог рада су: указати на постојећи међународни и национални нормативни оквир који уређује репродуктивно здравље жена са инвалидитетом и скренути пажњу на проблеме у вези са репродуктивним здрављем жена са оштећењем вида. Препоручићемо и одређене допуне нормативног оквира на националном нивоу.

**Кључне речи:** репродуктивно здравље, жене са инвалидитетом, жене са оштећењем вида.

## INTRODUCTION

World Health Organization (hereinafter: WHO) defines reproductive health as a state of complete physical, mental and social well-being, and not merely the absence of disease or infirmity, in all matters relating to the reproductive system and its functions and processes. Reproductive health implies that people are able to have a satisfying and safe sex life and that they have the capability to reproduce and the freedom to decide if, when and how often to do so (WHO, 2020). Reproductive health involves knowledge in the domains of family planning, reproductive system protection, prevention, diagnostics and treatment, termination of pregnancies, prevention of sexual abuse, and care about the victims (The Institute of Public Health of Serbia). It also implies that people have the possibility for responsible, satisfactory and safe sexual life and the freedom to decide on this aspect of life (Radulović et al., 2004).

However, information on reproductive health is not always available to women with disabilities (hereinafter: WWD) (Badu et al., 2019). When it comes to available forms which are adapted to persons with visual impairment, there is only one primary health care center (hereinafter: PHCC) in Vojvodina which provides a form with reproductive health data written in enlarged letters on the noticeboard of the women health department, whilst other PHCCs do not provide such information. Information in Braille is also lacking (Beker, Baćanović, 2018).

Women with visual impairment (hereinafter: WVI) state that they are confronted with physical and communication barriers, bad health care conditions, overprotection from family members, problems in sexual relations and becoming a mother. This can lead to a feeling known as double vulnerability: both as a woman and as a woman with disability (hereinafter: WWD) (Nicolau, Schraiber & Ayres, 2013). Some members of the so-called typical population think that blind women are not able to follow the trends in appearance, clothing and make-up, that they do not pay enough attention to this aspect, and cannot take care of themselves or become a wife or a mother (Oliveria et al., 2018). In all phases of growing up, WVI need information

and knowledge related to body changes and the necessary care, and especially information related to reproductive health and risk from sexually transmittable diseases (Aval et al., 2019).

For many WWD, having in mind specific conditions of growing up and dependence on the help and support of others, satisfying the need for partnership, sexuality and especially parenthood, becomes unattainable or happens under control of professionals or family members, who undertake the role of a carer. The Convention on the Rights of Persons with Disabilities (hereinafter: CRPD) emphasizes that these persons can and should build partnerships, marriages, families (Lakija & Urbanac, 2007). With regard to protecting women from discrimination, United Nations reacted in 1979, by adopting the *Convention on elimination of all forms of discrimination against women* (CEDAW) (Official gazette SFRJ, no. 11/81). It prescribes the obligation of the contracting states to undertake all appropriate measures for eliminating the discrimination of women, in order to provide *equal rights*, and, thus, also the right to health, including the reproductive right (Article 11 of the CEDAW).

### *REPRODUCTIVE RIGHT OF WOMEN WITH DISABILITIES*

Reproductive rights and freedoms represent a corpus of human rights and freedoms in the sphere of human reproduction. More specifically, “reproductive rights and freedoms provide individuals with the opportunity to exercise their own desires and personal decisions regarding reproductive practices, which implies the right to choose, that is to say, freedom to decide whether, when and how many children they will have, as well as the right to maintain the highest possible standard of sexual and reproductive health” (Bilinović 2015: 359). The reproductive right of women is determined by a considerable number of factors related to a person’s general health, socio-economic factors, family and the environment. Amongst the predictors of good reproductive health protection, the following are listed: a woman’s cultural background, family’s material status, life satisfaction, orderliness and rest, existence of risk factors, valuation of health, attitude towards personal responsibility related to health, trust in physicians (Miljković et al., 2010).

According to some assessments, WWD make one fifth of the female world population (WHO and World Bank, 2011). Due to numerous forms of discrimination related to sex and disability, they are faced with many barriers in maintaining reproductive health (Women Enabled International, 2019; Bundesministerium für Familie, Senioren, Frauen und Jugend, 2004). According to some opinions, WWD are unfit for the role of mothers, are asexual or have excessive sexual needs (European Disability Forum, 2019; World Bank, 2004), they are childish, overprotected and someone else has to take care of them (Oliveira et al., 2013), and they are unable to live with partners (European Disability Forum, 2019). They are treated as sexless and periodless persons (Märzhäuser, 2010).

Barriers that WWD face in the realization of reproductive rights are not necessarily the consequence of disability, but often reflect the lack of social attention and support, legal protection and understanding in general (WHO, UNPF, 2009). Basic forms and manifestations of the denial of rights from the reproductive health area, are: barriers in the access to information on reproductive health, goods and services; substitute decision-making and denial of personal autonomy; discriminatory health care in the area of sexual and reproductive rights; discrimination and stigma related to pregnancy and motherhood (Women Enabled International, 2019). Institutional and architectural barriers are also described, such as the lack of adapted accesses to health care premises, inaccessible toilettes, elevators, lack of hydraulic gynecologic tables. There are, also, social, economic and other factors arising from social deprivation and discrimination of WWD (Beker, Baćanović, 2018).

#### *Positive Examples of Policies and Activities Undertaken in the Area of Reproductive Health of Women with Disabilities*

When it comes to policies, programs and laws regulating reproductive health of WWDs, most of them are focused, at best, on the prevention of pregnancy, but ignore the fact that a considerable number of women aspire to become a mother and to have children. At worst, they impose forced sterilization, and, in the case of pregnancy, forced abortion (WHO, UNFP, 2009; Center for Reproductive Rights, 2002). Forced contraception and genital mutilation of women are also some of the examples of denying many women and adolescents their rights (European Disability Forum, 2019).

The aforementioned WHO definition of reproductive health relates to reproductive processes and functions in all life cycles, which is a very wide understanding of health and illness, and does not take into consideration only medical aspects, but also life periods – puberty, pregnancy, menopause (Bundesministerium für Familie, Senioren, Frauen und Jugend, 2004). At the 1994 International Conference on Population and Development, the United Nations Population Fund (hereinafter: UNPF), adopted the *Action Program* and invited the national governments to review, at all levels, the needs and rights of persons with disabilities (hereinafter: PWD) and eliminate their discrimination in the spheres of reproductive health, setting households and families. According to the Program, *the needs* related to, among other things, reproductive health, including family planning and sexual health, HIV/AIDS, information, education and communication, should be recognized at all levels (United Nations Population Fund, 1994, Paragraph 6.30).

The Action Program recognizes: *basic right of all couples and individuals to freely and responsibly decide on the number, place, time to have children, information and resources to realize that, right to maintain the highest attainable standard of reproductive health and right to decide on delivery, without discrimination and force* (United Nations Population Fund, 1994, Paragraph 7.3). When it comes to the programming of repro-

ductive health services, all factors that make PWD additionally vulnerable should be taken into consideration: health in all life cycles; mental and psychological needs in the context of reproductive and sexual health; accepting a disability acquired in the later phases of life; urgent health care and recovery; residential care (WHO, UNPF, 2009). It is recommended that, together with national governments, international organizations also act in this area (WHO, UNPF, 2009). The attitude of the United Nations which arises from the Program is clear: the realization of reproductive rights should be provided with all resources, with special emphasis on WWD, in all life cycles. However, it should be emphasized that such programs are *soft-law*, i.e. a kind of recommendations. Conventions, on the other hand, are obligatory for all contracting states, which have the responsibility to implement the Convention provisions through concrete acts and measures.

In support of the conclusions of the Action program, the United Nations General Assembly adopted the Convention on the Rights of Persons with Disabilities in 2006, which was ratified in Serbia in 2009 (Official Gazette RS, no. 42/2009). Article 6 of the Convention emphasizes WWD, accenting their double vulnerability, and obliges the contracting states to undertake measures to provide them with full and equal realization and enjoying of all human rights and basic freedoms, guaranteed by CRPD.

CRPD and the CEDAW regulate the issues of equal realization of rights and fight against discrimination of women, i.e. WWDs, in general. They mostly require the contracting states to adopt concrete acts and undertake measures in the realization of these state obligations and guarantees.

Thus, the Austrian Ministry of Health and Women (Bundesministerium für Gesundheit und Frauen) enacted the Action Plan for Women's Health in 2017, encompassing 17 objectives and 40 measures, which are further developed in detail. The Plan is structured in a way that it encompasses all life cycles of women, in line with the aforementioned UN Action Program. Table 1 lists several objectives which are relevant for WWD reproductive health.

For the purpose of improving WWD status, Austria undertook some initiatives at the federal level, as, for example, adopting the *National Action Plan for Disability 2012-2020* (Bundesministerium für Arbeit, Soziales, Gesundheit und Konsumentenschutz, 2012 (2019), since further measures were necessary to offer the same opportunities to WWDs and others (Bundesministerium für Gesundheit und Frauen, 2017). The Action plan sets the following objectives: to take into consideration gender perspectives in all plans and politics related to disability; to encompass the right to self-determination in all life spheres of WWD (in the sphere of sexuality, as well); to empower WWD in personal rights and access to health institutions (especially gynecologic); to adequately inform WWD and/or their representatives on the need to

visit physicians, at the same time protecting their private and intimate sphere (Bundesministerium für Arbeit, Soziales, Gesundheit und Konsumentenschutz, 2012; 2019).

*Table 1*

No. of objective	Objective	Measures implementing the objective
4	Sensibilization in institutions for the issues specific for women	1) Train women in residential institutions on their rights and equality for the purpose of increasing their consciousness of the possibility of self-determination and autonomy in deciding 2) Improve competences of counselling, especially related to life situation of WWD
7	Promote positive self-image, for healthy life	1) Provide and practice the development of programs for building self-confidence, sensibilization and informing, related to image of themselves and their bodies 2) Adopt legal regulation supporting the building of positive self-image
9	Promoting and protecting women sexual health	1) Provide an “information offensive” which includes women’s sexual health; Provide broad coverage of counselling services; Develop <i>Online</i> -portals 2) Set interministerial dialog and inclusion of important policy creators related to long-term requests in this area; Make free resources for protection and safe sex available 3) Provide support for implementation and evaluation of regulation on “sexual education” 4) Develop quality criteria for institutions in the area of sexual education 5) Provide crisis intervention, care and control, “safe homes” 6) Develop school systems of support related to gender equality
11	Strengthening women’s mental health	1) Set the request for women’s mental health as the mandatory part of all health and social programs 2) Provide psychiatric and psychological care as the equal part of medical treatment
13	Promoting reproductive health	1) Support women in self-determination of own sexuality (for example, easy access to protection resources); Enable possibility of pregnancy termination 2) Introduce holistic care in pregnancy and delivery 3) Implement guidelines for cesarean section, according to international models 4) Insist on the service of psychological care while searching for solutions in prenatal diagnostics and treatment by assisted reproduction measures

Available at: <https://fgoe.org/sites/fgoe.org/files/inline-files/Aktionsplan-Frauengesundheit.pdf>

*National Response to the Right to Reproductive Health of Women  
with Disabilities*

The Republic of Serbia does not have mandatory provisions which specifically regulate measures to support the realization of equal rights of WWD in the field of reproductive health. Some systemic acts, however, provide a general frame for the possibility of further regulation of guaranteed rights.

*Law on prevention of discrimination of persons with disabilities* (Official Gazette RS. No. 33/2006 and 13/2016) regulates, in general, the ban of discrimination, not specifically tackling women, but regulating the ban of discrimination due to disability, related to using health services (Article 17). This provision regulates that every discrimination of PWD during delivery of health services is considered a severe case of discrimination due to disability.

*Strategy for improving the status of persons with disability in the Republic of Serbia* (Official Gazette RS. No. 1/2007), as one of the specific objectives (no. 10), emphasizes developing and ensuring equal possibility for WWD for equal and active participation in the community life. The measures planned for realization of this objective are: 1. Develop and ensure the access to necessary and appropriate services; 2. Increase the consciousness of society and PWD of the relations between gender and disability; 3. Provide information on the position of WWD, their social roles and vulnerability related to family violence; 4. Provide information on women human rights (reproductive right) to WWD; 5. Undertake measures for prevention of violence, abuse and exploitation of WWD; 6. Develop and implement programs of psycho-social and legal support to WWD, who suffered violence, abuse and misuse; 7. Provide support to organizations and institutions dealing with prevention of violence towards PWD; 8. Undertake measures and activities for the purpose of increasing knowledge and skills level of WWD for equal and active participation in social life.

These acts are general and twofold: they relate to all PWD (and therefore, in one aspect, to women, as well), and they are not concrete legal provisions obliging to specific act or refraining from act, which would be followed by sanctioning. The mentioned acts need concretization through by-law regulations, programs and plans. The concretization of the prescribed rights through specific instrument has already been undertaken for CRPD, related to persons with mental and intellectual disabilities. The Instrument was developed by WHO in 2018 (WHO, 2018), which endeavored to work on the improvement of the selected standards, together with the national governments.

Most of the comparative legal systems have not gone much further than the national legal system. However, the Austrian Ministry of Health and Women has, for example, undertaken specific steps. These steps could be a

good indicator for Serbia, that the existing regulation represents adequate strategic frame, which should be further elaborated through specific measures, budget and other resources.

### *PROBLEMS RELATED TO REPRODUCTIVE HEALTH OF WOMEN WITH VISUAL IMPAIRMENT*

It is estimated that, in 2010, there were cca. 286 million of persons with visual impairment and 39 million with total blindness, with a considerable increase expected in future (Pascolini & Marriotti, 2012), having in mind that the main causes of visual impairment, cataract, refraction anomalies, glaucoma and diabetes retinopathy, are increasing. According to the data of the International Agency for the Prevention of Blindness, cca. two thirds of all blind and visually impaired persons are women (International Agency for the Prevention of Blindness, 2018), while, according to the assessments of WHO, this number goes to 64% (WHO, Department of Gender, 2002).

Results of some studies emphasize that the knowledge of young people with visual impairment and availability of information on reproductive health and sexually transmittable diseases are quite low (Nicolau, Schraiber & Ayres, 2013), that young WVI are not qualified enough with regard to reproductive health, contraception, prevention of reproductive tract infections, menstrual hygiene (Joshi & Joshi, 2019). In some communities, conversations related to reproductive and sexual rights are still considered taboo. Most young people with visual impairment in African countries have a low level of knowledge on reproductive health and sexual rights, and do not know where to search for medical, legal or social advice. Blind girls, in particular, do not have the knowledge on reproductive health, they very often have low self-respect, problems in mobility, using free time and building carriers. The study *Effect of health educational program for females blinded adolescent students regarding reproductive health* conducted in Cairo on the sample of 71 female persons 10-18 years of age, determined that most information and knowledge on reproductive health were related by mothers and friends. The authors of the study came to the conclusion that more than two thirds of information sources were friends and that they had a prominent role in informing. Topics that deserved special attention in the study were: reproductive health, puberty, sexually transmitted diseases, family planning, period and menstrual hygiene (Abd-El Sattar Ali & Abd-El Aal, 2015). In some countries, WVI can have knowledge and information on reproductive health, but this does not necessarily mean autonomy in deciding or using specific health service related to reproductive system (Badu et al., 2019). The results show that the diagnosis of sexually transmittable diseases comes too late in WVI, which can be related to difficulties in accessing health services, structural barriers, religious commitments, low education level, lack of trust



in the system of data and privacy protection. In a study conducted in Brazil in 2015, it was recorded that older blind women had low level of prevention of sexually transmittable diseases and negative attitudes toward sexual relations (Araújo *et al.*, 2015). The objective of a study conducted in India was to find out the level of knowledge of WVI on health care and access to health services. The authors stated that absence of WVI on gynecology clinics increased their interest in conducting the study and finding out their way to access the information on this topic. Fifteen young women, 19-27 years of age, who visited the gynecologist for the first time, participated in the research. More than half of the women stated that mothers informed them on menstruation and menstrual hygiene, one third found out these facts from peers, and the others stated that this information was given to them by a sister, cousin or teacher. For most of them, spasms and stomach pain were the announcement of menstruation, and warm discharge and the feeling of inanition were the signs of menstruation appearance. Menstrual cycles were regular in all except one participant. Menstrual bleeding ranged from 2 to 5 days and the cycle duration was from 26 to 35 days. All were independent in taking care of their menstrual hygiene. More than half of them reported that they were taught on menstrual hygiene by their mothers and almost a third by their friends. Others reported that their sister, aunt, teacher helped them learn menstrual hygiene. None of them complained of discharge per vaginum or urinary burning or increased urinary frequency. Primary spasmodic dysmenorrhea was reported by 80% of the participants (Joshi & Joshi, 2019). Although there is no reliable data, Kelly and Kapperman think that frequency of infections caused by chlamydia and gonorrhoea, in young WVI, comes at similar percent as in the peers with typical development and that youth with visual impairment enter into sexual relations two to three years later than youth without visual impairment (Kelly & Kapperman, 2012).

Some authors state that additional support to blind and visually impaired women in health care, prevention and treatment system is seldom recognized, and that they are confronted with structural and communication barriers, unpreparedness of professionals and often complicated access to health care and activities focused on reproductive health (Goyal, 2017). Additional complications come with the prejudices that a blind woman does not fit to the contemporary ideal of a pretty woman, that she cannot arouse interest to be a sexual partner, i.e. that, generally, WVI are perceived as less desirable partners. Persons with typical development often believe that it is difficult for these women to be in the role of a partner or a mother, and that their potential to be one is accompanied by numerous problems (Oliveira *et al.*, 2018; Nicolau, Schraiber & Ayres, 2013; Joshi & Joshi, 2019). Compared to men with visual impairment, women are confronted with more difficulties in solving the problems related to sexuality (Bezerra & Pagliuca, 2010). On the other hand, sexual development of adolescents with visual impairment shows the same characteristics as the one of adolescents with typical development.

Blindness does not decrease sexual interest, and blind girls and boys also wish to explore their body and how it sexually functions (Kef & Bos, 2006). Blind girls also try to define their identity and place in society, to discover their own sexuality and to live it in spite of lacking or limited information on the topic and sometimes without good understanding of what is happening to them. Therefore, unplanned pregnancies can often be expected, and their termination, can, potentially jeopardize reproductive health (Bezerra, & Pagliuca, 2010). According to the statements of girl adolescents with visual impairment, most of them do not clearly understand advice they get from their parents. This happens due to the fact that advice is given indirectly, and actually, represents a form of warning about the consequences that can occur from unwanted pregnancy. In such situations, advice is not directly oriented to safe sexual life and care for reproductive health, but is general, diffuse and almost always derives from insufficient knowledge of parents to communicate this information to their daughters (Bezerra & Pagliuca, 2010). However, blind and visually impaired girls have the need to be in the role of a partner in emotional and sexual relations, most of them are interested in gaining knowledge about their bodies, sexual and reproductive health and wish to make autonomous decisions (Oliveira & Pagliuca, 2014).

### *DISCUSSION AND CONCLUSION*

Although laws regulate that blind and visually impaired persons have the right to get information on reproductive health, there are still weaknesses in the implementation of activities ensuring these rights and consistent access to services and prevention programs (Araújo *et al.*, 2015). For the purpose of comprehensive and systematic development of consciousness on the need of maintaining and improvement of reproductive health, it is necessary to provide continuous health education programs and information from accurate sources. Reproductive health, menstrual hygiene, contraception, prevention of reproductive tract infections, represent relevant topics in the education process and should be gradually and systematically introduced at all education levels. It is also recommended that parents are involved in these topics, in order to develop consciousness of the need for care and improvement of reproductive health and prevention of infections and illnesses transmittable through intercourse. Sometimes, the feeling of embarrassment and lack of communication skills lead to situations where children do not want to talk openly with parents on the issues of reproductive and sexual health. Designed and well implemented programs of sexual education, prevention and risky sexual behavior can influence the quality of reproductive health in young WVI.

Despite sensory limitations, blind persons state that television programs with reproductive health topics are very useful for them, that they are an education tool, regardless of the fact that they cannot see the pic-

tures on TV. On the other hand, it is possible to prepare tactile pictures and models and to realistically display reproductive organs and their functioning. Depending on the age and education level, pictures should be gradually made more comprehensive and the information and knowledge level in this area increased. Information prepared in the specific written format, could be of significant use. Apart from the adequate format of information, access to services should be provided, made easier, and adapted, so that WVI can overcome the barriers they are confronted with. All these issues are related to public-health policy and, therefore, represent an obligation of the state and local municipalities.

Young women with disabilities should be made conscious of the significance of regular annual visits to gynecologist during their visits to selected physicians, but also other professionals they are in contact with.

Multisector access is important for the use of reproductive health services and can be achieved through continuous education of all service providers in the system: health and social care professionals, educators, associations of blind and visually impaired persons.

Competent bodies relevant for this public-health issue (ministries, public health institutes, local municipalities, education institutions) should develop and continuously implement the campaign through media, education and other activities.

It is also necessary to allocate resources for the access to reproductive and sexual health services to women with different kinds of disabilities. These resources should be allocated in the budget of the National Health Insurance Fund of the Republic of Serbia, and the state budget. Various auxiliary devices that facilitate the access to services, also require certain financial resources, but, in the end, this makes health care services sustainably accessible.

**Acknowledgments:** This paper was written as a part of projects *Creating a protocol for assessing educational potentials of children with disabilities as a criterion for the development of individual educational programs* (No. 179025) and *Social participation of persons with intellectual disability* (No. 179017) financed by the Ministry of Education, Science and Technological Development of the Republic of Serbia and the 2020 Research Program of the Institute of Social Sciences with the support of the Ministry of Education, Science and Technological Development of the Republic of Serbia.

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## РЕПРОДУКТИВНО ЗДРАВЉЕ ЖЕНА СА ОШТЕЋЕЊЕМ ВИДА

Бранка Јаблан<sup>1</sup>, Марта Сјеничић<sup>2</sup>

<sup>1</sup>Универзитет у Београду, Факултет за специјалну едукацију и рехабилитацију,  
Београд, Србија

<sup>2</sup>Институт друштвених наука, Београд, Србија

### Резиме

У великом броју земаља још увек постоје слабости у обезбеђењу доследног приступа превентивним програмима и услугама из подручја репродуктивног здравља женама са инвалидитетом. Иако и на међународном и на националном нивоу постоји правни оквир за бољи приступ овим услугама, он углавном није довољно правно конкретизован, а самим тим је и недовољно примењен у пракси. Додатна подршка женама са оштећењем вида у систему здравствене заштите, превенцији и систему лечења ретко је препозната, те је њихово одсуство на гинеколошким клиникама у значајној мери подигло интересовање удружења слепих и слабовидих, као и теретичара, око тога како оне приступају информацијама и услугама из домена репродуктивног здравља. Познато је да се често сусрећу са структуралним и комуникативним баријерама, неспремношћу професионалаца и често компликованом приступу здравственој нези и акцијама усмереним на репродуктивно здравље. Са друге стране, сексуални развој адолесцената са оштећењем вида показује исте карактеристике развоја као код адолесцената типичног развоја. Слепе девојке, као и девојке без оштећења вида, покушавају да дефинишу свој идентитет и место у друштву, да открију сопствену сексуалност и да је доживе. У томе их често онемогућују или ограничавају недостајуће или недовољне информације о теми, па самим тим и лоше разумевање онога што им се дешава. Девојке са оштећењем вида такође имају потребу за остваривањем у партнерској улози, емоционалном и сексуалном повезаношћу, заинтересоване су да стекну знање о свом телу, сексуалном и репродуктивном здрављу.

У спроведеним студијама истакнута је потреба да се женама са оштећењем вида континуирано обезбеђују информације о приступу услугама репродуктивног здравља. Препорука је и да се током посета изабраним лекарима и другим професионалцима са којима су ове жене често у контакту указује на значај редовних годишњих посета гинекологу. Оснаживања мултисекторског приступа овом питању је такође значајно и препознато кроз непрестано подучавање свих пружалаца услуга у систему: здравствених радника, стручних радника у социјалној заштити, просветних радника, организација савеза слепих и слабовидих.

Надлежна тела релевантна за ово питање треба да се посвете питању заштите репродуктивног и сексуалног здравља жена са инвалидитетом, као и борби против дискриминације ових жена, те да осмисле и спроведе кампању кроз медије, предавања и на други начин, на ову тему. Поред тога, потребно је у јавним буџетима обезбедити средства за посебан приступ услугама заштите репродуктивног здравља женама са инвалидитетом. И, на крају, али не и мање битно, ове мере би требало прилагодити свакој групи жена са инвалидитетом, с обзиром на врсту инвалидитета, те информације и олакшани приступ услугама адаптирати на начин којим се превазилазе конкретне препреке на које оне наилазе.





## RELATIONSHIP BETWEEN FACEBOOK-RELATED BEHAVIORS AND CHARACTERISTICS OF A ROMANTIC RELATIONSHIP

Ivana Isailović, Jelena Šakotić-Kurbalija\*

University of Novi Sad, Faculty of Philosophy, Novi Sad, Serbia

### Abstract

The problem of this study was to explore the relationship between Facebook-related behaviors and characteristics of romantic relationships. Based on the results of previous research, we assumed that there would be significant gender differences in the frequency and manner of using Facebook, that there would be a significant relationship between the attachment style and Facebook monitoring and Facebook-related conflicts, and that Facebook monitoring and Facebook-related conflicts would significantly predict relationship quality. The sample consisted of 201 respondents from Serbia, 42.5% of which were male. Using the Dyadic adjustment scale - DAS (Spanier, 1976, 1989), Interpersonal electronic surveillance - IES (Tokunaga, 2011; modification Tucker, 2014), The Facebook-related Conflict Scale (Clayton, Nagurney, & Smith, 2013) and Experiences in Close Relationships Inventory - ECR (Brennan, Clark, & Shaver, 1998; modification Kamenov & Jelic, 2003), results showed that women use Facebook and post the relationship status and pictures with a partner more often than men and that people with an insecure attachment style more often engage in Facebook monitoring. Also, results showed that Facebook-related conflicts are a significant predictor of relationship quality. The present study contributes to the understanding of romantic relationship dynamics in the age of social networking sites, by pointing to the relational factors that are potentially at risk because of Facebook use.

**Key words:** Social networking sites, Romantic relationships, Attachment, Conflicts, Electronic surveillance.

## ПОВЕЗАНОСТ ПОНАШАЊА НА ФЕЈСБУКУ И КАРАКТЕРИСТИКА ПАРТНЕРСКОГ ОДНОСА

### Апстракт

Проблем овог истраживања био је да испита повезаност између понашања везаних за употребу Фејсбука и карактеристика партнерског односа. На основу

\* Аутор за кореспонденцију: Јелена Шакоћић-Курбалија, Универзитет у Новом Саду, Филозофски факултет, Др Зорана Ђинђића 2, 21102 Нови Сад, Србија, [jelenasakotickurbalija@ff.uns.ac.rs](mailto:jelenasakotickurbalija@ff.uns.ac.rs)

результата досадашњих истраживања, претпоставили смо постојање значајних полних разлика у учесталости и начину коришћења Фејсбука, као и постојање значајне повезаности стила афективне везаности, надзирања партнеровог понашања на Фејсбуку и конфликта везаних за употребу Фејсбука. Такође, претпоставили смо да су степен надзирања партнерових активности на Фејсбуку и конфликти везани за употребу Фејсбука значајни показатељи квалитета везе. На узорку од 201 испитаника из Србије, од којих је 42,5% мушког пола, примењене су Скала дијадне прилагођености (*Dyadic adjustment scale* – DAS; Spanier, 1976, 1989), Скала електронског надзирања (*Interpersonal electronic surveillance* – IES; Tokunaga, 2011; модификација: Tucker, 2014), Скала конфликта везаних за Фејсбук (*The Facebook-related Conflict Scale*; Clayton, Nagurny, & Smith, 2013) и Инвентар искустава у блиским односима (*Experiences in Close Relationships Inventory* – ECR; Brennan, Clark, & Shaver, 1998; модификација: Kamenov & Jelić, 2003). Резултати показују да жене чешће користе Фејсбук, објављују свој статус везе и фотографије са својим партнером у односу на мушкарце и да несигурно везане особе чешће надзиру понашање свога партнера на Фејсбуку. Поред тога, резултати показују и то да су конфликти везани за Фејсбук значајан показатељ квалитета везе. Резултати истраживања доприносе бољем разумевању динамике романтичних односа у савременом тренутку употребе друштвених мрежа, указујући притом на могуће ризике употребе Фејсбука.

**Кључне речи:** друштвене мреже, романтичне везе, афективна везаност, конфликти, електронско надзирање.

## INTRODUCTION

Romantic relationship quality is a construct that stems from the “marital quality” construct (Lewis & Spanier, 1979) and represents the subjective evaluation of a romantic couple’s relationship on a number of dimensions and evaluations (Spanier & Lewis 1980, p. 826). Relationship quality is positively associated with good adjustment, adequate communication, a high level of relationship happiness, integration, and a high degree of relationship satisfaction (Lewis & Spanier 1979, p. 269). Recent research of relationship quality has tended to focus on interpersonal factors, such as interactions between partners, or intrapersonal factors, such as personality traits and attachment styles (Watson, Hubbard & Wiese, 2000), and has emphasized the importance of communication between partners for the growth and development of relationships (e.g. Sternberg, 1986; Meeks, Hendrick & Hendrick, 1998). Research show that good communication strategies between partners represent a significant predictor of relationship satisfaction (Overall, Fletcher, Simpson, & Sibley, 2009). Couples with good communication strategies have benefits in terms of maintaining relationship quality, while couples with poorer communication strategies have a perception of greater investment in the relationship, less success in the relationship and more conflict (Christensen & Shenk, 1991; Egeci & Gencoz, 2011). Research has shown that in recent times, communication among romantic couples most often takes place through social networking sites (Kalpidou, Costin, & Morris, 2011).

Social networking sites changed the landscape for interpersonal communication, especially in the area of romantic relationships (Rus & Tiemensma, 2017). In a survey conducted by Hall (2014), it was estimated that 35% of all couples who have entered into a marriage between 2005 and 2012, started their relationship through these sites. It has also been shown that social networking sites play a significant role in all stages of romantic relationships, including initiation, escalation, maintenance, dissolution, and even monitoring partner's behavior after the breakup (Smith & Duggan, 2013).

### *Social Networking Sites*

Social Networking Sites (SNS) represent a social community organized in a virtual world. Connecting with people on social networking sites does not require immediate physical surrounding. These sites enable the creation of a public or semi-public profile, whereby users can become "friends" with other users of these sites. The basic idea of constructing the SNS was to create the ability to connect people who know each other in the real world through the Internet, which would facilitate their communication (Boyd, 2008).

Social network users usually represent themselves with real names, which are often accompanied by their picture. In other words, the user profile represents a personal representation on the Internet (Boyd, 2008). It is considered that SNS are a valuable method of maintaining friendships (Ellison, 2007). SNS are the main medium for communication and the establishment and maintenance of interpersonal relations (Boyd, 2008; Turkle, 2011). Research has shown that Facebook is the most used social networking site, with over two billion active users around the world, on a monthly basis, including 74% of young people aged 12 to 24 in the United States (Boyd, 2008; Kalpidou, Costin, & Morris, 2011). Although there has recently been an expansion in the use of other social networking sites, Facebook still has 25% more users than Twitter, and 50% more than Instagram. It has been shown that almost half of Facebook users visit this social network at least six times a week and that US residents spend more time on Facebook than on any other website (Nielsen, 2011).

Facebook is a social network with different options. On Facebook, it is possible to post statuses, different pictures on personal or other people's profiles, to comment on statuses and/or pictures of other people, post personal biography, etc. Due to a large amount of personal information that users post on this social network, Facebook has become one of the most interesting topics for researchers. Most research conducted on Facebook focused on friendships, networking, online/offline communication and privacy issues (Boyd, 2008). However, when Facebook introduced the possibility to share information on relationships with online friends

and emotional partners, and merge profiles based on these characteristics, researchers in the field of psychology of intimate relationships raised the question of how characteristics and functions of Facebook are associated with the characteristics of a romantic relationship.

In this paper, we will try to include the existing theories in the field of intimate relations to explore how social network use between partners is related to relationship quality. We will dedicate special attention to previous research on predictors of relationship quality in the context of the use of social networking sites (e.g. Muise, Christofides, & Desmarais, 2009; Joinson, 2008).

### *Theoretical Approaches and Previous Research on the Relationship of the SNS Use and the Characteristics of a Romantic Relationship*

In the available literature, there is no unique theoretical framework for studying the relationship between the use of SNS and the characteristics of a romantic relationship (Rus & Tiemensma, 2017). Theories in this field are still developing, and research involves different constructs. Rus and Tiemensma (2017) state that the theories in the field of romantic relationships that are most often associated with the characteristics of romantic relationships in the era of social networking sites are Theory of Interdependence (Thibaut & Kelley, 1959), the Structural interdependence theory (Milardo, 1986; Surra, 1988) and The Attachment Theory (Bowlby, 1973).

According to the Interdependence Theory (Thibaut & Kelley, 1959), the development, growth and eventual resolution of close relationships are a consequence of social exchange, more precisely, the exchange of benefits and losses between the partners and between partners and others. The central construct of this theory is the "level of dependency" which implies the degree to which an individual needs a relationship or a measure in which an individual relies on a relationship to meet the desired expectations. According to this theory, a person's satisfaction with a romantic relationship can be assessed if the expectations from the relationship are known. If the expectation level exceeds benefits, a person will be dissatisfied, or otherwise. It is important to note that the level of expectation of relationships relies on the experience of past relationships, so a person who has had unsatisfactory relationships in the past can be satisfied with a small benefit from the current relationship, while for a person who in the past had satisfactory relationships even a high gain from the current relations can be inadequate (Tadinac, Kamenov, Jelic, & Hromatko, 2007).

Closely related to the Interdependence Theory is the Structural interdependence theory, which refers to the connection between couple's social network and dyadic adjustment (e.g., Milardo, 1986; Surra, 1988). The term dyadic adjustment is used to describe the experience of couples

acclimating to a relationship (Spanier, 1976). Dimensions used to determine levels of dyadic adjustment include relationship satisfaction, cohesion, agreement, affection, and conflict (Spanier, 1976). Relationship satisfaction represents partner's subjective evaluation of the relationship, and, therefore, is distinct for each partner. Cohesion describes commitment to the relationship and companionship received from the relationship. Agreement on important issues is also vital to well-adjusted relationships. These relationships are characterized by affection and calm resolution of conflict (Kendrick & Drentea, 2016). The Structural interdependence theory suggests that as a couple becomes more involved and interdependent, they develop increasingly interdependent networks. The pattern of ties in the couple's social networks influences the flow of resources that affect the potential for the couple's dyadic adjustment (Kearns & Leonard, 2004).

Considering the fact that the development, growth and eventual disintegration of close relationships are a consequence of social interactions, and that a good deal of interactions among partners is taking place online today, it seems important to apply the principles of these theories to virtual interactions. According to both the Interdependence Theory and the Structural interdependence theory, an individual will be more dissatisfied with a relationship if he reports more negative than positive online interactions with a partner (Clayton, Nagurney, & Smith, 2013). Also, in line with the basic principles of both theories it is assumed that if one or both partners feel that they do not get enough support and get a lot of criticism for online behavior, they will be less satisfied with the relationship, due to an excessive imbalance in benefits and losses within the relationship. In other words, a person will be dissatisfied with a relationship if their partner does not post or even refuses to post a relationship status or a picture, exchanges messages with the opposite sex, etc. Although research has not yet examined the ways in which romantic partners use relationship status, preliminary studies have shown that publicly disclosing the single status is a reliable and effective method for making contact with potential romantic partners (Young, Dutta, & Dommety, 2009). In accordance with the Theory of Interdependence, it is possible that the "single" status gives the opportunity for a person to find more desirable alternatives, which causes the partner's dissatisfaction with the relationship. Using this theory, Fox and Warber (2013) examined adult experiences with Facebook, focusing primarily on relationship status. The results of this study have shown that posting the relationship status is related to a greater sense of commitment and intensity of closeness among partners. Gender differences in the perception of the significance of this status were identified, with women more perceiving that this status conveys commitment and intensity of closeness. Additionally, the results of this study have shown that setting up a profile picture in which a person and their

emotional partner are shown together and posting messages involving an emotional partner is associated with greater intimacy. This kind of Facebook use indicates how much people care about their partner and how serious a romantic relationship is (Papp, Danielewicz, & Cayemberg, 2012).

The Attachment Theory assumes that, in relation to securely attached persons, persons with insecure attachment styles tend to experience lower levels of trust, satisfaction, intimacy, and stability in their romantic relationships (Kirkpatrick & Davis, 1994). They are also prone to jealousy (Buunk, 1997). People with insecure attachment tend to be suspicious and worry that their partner will leave them (Guerrero, 1998), which increases the monitoring of partner behavior for the purpose of searching for signs of declining interest. For these reasons, partners with insecure attachment often use social networking sites to monitor their partner's activities and often, each sign of communication of their partner with the opposite sex is perceived as a threat to a relationship. On the other hand, people with a secure attachment rarely resort to these behaviors and use Facebook for other purposes, such as communicating with other people, browsing interesting content, and the like.

Using the Attachment Theory, Emery, Muise, Dix, & Le (2014) have pointed out the existence of a relationship between attachment style and behavioral and emotional responses to behavior on social networking sites. According to the results of this research, people with insecure attachment show behavior that indicates the desired closeness and fear of abandonment, such as the high visibility of a romantic relationship on social networking sites. Researchers consistently point out that people with a preoccupied attachment often monitor partner's behavior on social networking sites more closely (Fox & Warber, 2013; Marshall, Bejanyan, Di Castro, & Lee, 2013; Muise, Christofides, & Desmarais, 2014). Applying the Attachment Theory in the context of the use of social networking sites suggests that the adult attachment style motivates offline romantic behavior (Collins & Allard, 2001) and can also transfer into the online behavior of romantic partners (Rus & Tiemensma, 2017).

In general, the results of studies of the relationship between Facebook use and the characteristics of the romantic relationship are inconsistent. Certain research (eg. Kujath, 2011) pointed to a positive relationship between the use of social networks and growth and the development of partner relationships. Also, research showed that virtual communication among partners increases the likelihood of communication in the real world (Ledbetter et al., 2011) and it is in a positive relationship with the perception of the relationship quality (McGlynn, 2006, according to Carpenter & Spottswood, 2013).

On the other hand, more research suggests that the insight into a partner's past through Facebook can cause a variety of feelings, such as envy, jealousy, and conflicts in relationships, which may be associated

with a reduction in the level of satisfaction and security in a partner relationship (Papp, Danielewicz, & Cayemberg, 2012). Studies show that compulsive Facebook use is associated with more conflicts among partners, the experience of exclusion and concealment, as well as perception of less commitment, passion, and intimacy (Billedo, Kerkhof, & Finkenauer, 2015). Clayton, Nagurney and Smith (2013) found that Facebook-related conflict is associated with negative relationship outcomes. Additional research has found that monitoring partner's Facebook activities increase the probability of engaging in other obsessive behaviors (Fox & Warber, 2013; Fox, Warber, & Makstaller, 2013). It has also been shown that the use of the Internet for the purpose of monitoring a partner's behavior is negatively related to the relationship quality, and relationship certainty (Tokunaga, 2011).

### *Research Goals and Hypothesis*

Considering the inconsistency of previous research results, the first goal of this study is to provide a more detailed insight into the relationship between Facebook use and relationship characteristics, using the Interdependence Theory and the Attachment Theory as theoretical frameworks. Based on the results of previous studies that state that women are more likely to use social networking sites, post pictures with a romantic partner, and the relationship status (Park, Kee, & Valenzuela, 2009), we propose the following:

H1: Women use Facebook and post the relationship status and pictures with a partner more often than men.

H2: More frequent use of Facebook is related to lower relationship quality.

H3: There is a significant relationship between the use of Facebook and the attachment style. Persons with an insecure attachment style more often post the relationship status and pictures with a partner than persons with a secure attachment style.

The second goal of this study is to examine the relationship between attachment style and Facebook-related behaviors. As mentioned earlier, people with an insecure attachment tend to feel lower levels of trust, satisfaction, intimacy, and stability in their romantic relationships (Kirkpatrick & Davis, 1994). They also tend to be suspicious and worried that their partner will leave them (Guerrero, 1998). For these reasons, they often use social networking sites to track monitor partners' activities. Results of previous research also showed that conflicts related to Facebook use were associated with lower relationship satisfaction (Papp, Danielewicz, & Cayemberg, 2012). Following the above-mentioned research, we propose:

H4: There is a significant relationship between the attachment style, conflicts over Facebook use Facebook monitoring. Men and women

with insecure attachment styles are more often involved in Facebook monitoring and have more conflicts over Facebook use than men and women with a secure attachment style.

The last goal of this study is to examine the contribution of conflicts over Facebook use and Facebook monitoring to the prediction of the relationship quality, relative to the attachment style. Based on the previous research (Papp, Danielewicz, & Cayemberg, 2012), we expect that:

H5: Among persons with insecure attachment, Facebook monitoring and conflicts over Facebook use significantly predict the relationship quality. However, among persons with secure attachment styles, only conflicts over Facebook use significantly predict the relationship quality.

## METHOD

### *Sample and Procedure*

In the present study, we used a convenience sampling method. Data was collected using the CAWI (Computer-Assisted Web Interviewing) technique. Participation was anonymous and voluntary. The study included only participants older than 18 years of age, who were not married/cohabitating nor with children and who were in a current romantic relationship for a minimum of 6 months. After excluding missing data and participants who did not meet the inclusion criteria, the sample amounted to 201 respondents 42.5% of whom were male. The average age of the participants was 28.26 years ( $SD = 5.56$ ;  $Min = 19$  years old,  $Max = 54$  years old), with no statistically significant gender differences in age ( $t(199) = -1.24$ ,  $p > .05$ ). The average relationship length was 42.93 months ( $SD = 40.15$ ;  $Min = 6$  months,  $Max = 22$  years). There were significant gender differences in the relationship length ( $t(199) = -4.29$ ,  $p < .01$ ), with women having longer relationships ( $M_{women} = 54.41$ ,  $SD_{women} = 47.52$ ;  $M_{men} = 31.10$ ,  $SD_{men} = 26.17$ ). Participants also provided information on the place of living, with the most participants living in a city (51.5%), and employment, with the most participants being employed (70.9%). It is important to state that there was a significant relationship between the relationship length and conflicts over Facebook use ( $r = -.22$ ,  $p < .01$ ). There were no significant correlations between relationship length and Facebook monitoring ( $r = -.13$ ,  $p > .05$ ), or between the relationship length and the relationship quality ( $r = .14$ ,  $p > .05$ ).

### *Measures*

*Facebook Use scale* was designed for this research. Within this scale, respondents were asked questions related to daily Facebook visits and the frequency of weekly Facebook usage. In addition to these questions, the respondents were asked to respond to two questions concerning



the status of their relationship on Facebook: 1. "Is your relationship status posted on Facebook, 2. If the answer to the previous question is affirmative, is your relationship status with your partner displayed on Facebook in a way that your profiles are linked? Also, the respondents were asked to answer the question "Do you, as a profile picture, post a picture in which you and your partner are shown together?", with possible answers: 1. "Yes, I always post profile picture on which partner and I are together, 2. "Sometimes I put something else, but I often post a profile picture on which partner and I are together." 3. "I rarely post a profile picture on which partner and I are together"; and 4. "I never post a profile picture on which partner and I are together."

*Dyadic adjustment scale* (DAS, Spanier, 1976, 1989) was used for measuring relationship quality. The scale has 32 items, organized into four subscales, including dyadic satisfaction ( $n = 10$ ), cohesion ( $n = 5$ ), consensus ( $n = 13$ ), and affectional expression ( $n = 4$ ).

Because the DAS was originally designed to measure the relationship quality between married or cohabitating couples, according to Hand, Thomas, Buboltz, Deemer, & Buyanjargal (2013) for this research one question was changed from "Do you ever regret that you married or lived together?" to "Do you ever regret getting into a relationship with your partner?". The reliability of this scale was .88.

*Interpersonal electronic surveillance* (IES, Tokunaga, 2011), a modified version (Tucker, 2014), was used to measure Facebook monitoring. The original scale refers to the usage of all social networking sites, while in the modified version, the items refer exclusively to Facebook. Like the original, the modified scale consists of 12 items measured on a 7-point Likert scale from 1 – strongly disagree to 7 - strongly agree. Statements include visiting partner's Facebook page often, looking through partner's Facebook pictures, noticing when partner updates his/her Facebook page, trying to monitor partner's behaviors through his/her Facebook page, etc. Higher scores reflect higher usage of Facebook for surveillance. Two professional translators, with knowledge of education and psychology, worked independently, and then they compared their translations to identify any variance in translation, in order to assess equivalence. Cronbach's alpha for this scale was .82.

*The Facebook-related Conflict Scale* (Clayton, Nagurney, & Smith, 2013) is a six-item questionnaire used to measure how Facebook use may increase complications in an intimate relationship. Items include arguments over commenting friends' profiles, reconnecting with individuals with whom respondents have had past romantic relationships, etc. As for the previous scale, two independent translators compared their translations to identify any variance in translation, in order to assess equivalence. The Cronbach's  $\alpha$  for the scale in the present study was .95.

*Experiences in Close Relationships Inventory* (ECR, Brennan, Clark, & Shaver, 1998; modification Kamenov & Jelic, 2003). To identify partners' attachment styles we used a shortened version of the scale of 18 items (Kamenov & Jelic, 2003). The instrument consists of the anxiety ( $\alpha = .71$ ) and the avoidance subscale ( $\alpha = .78$ ). By combining the scores on the specified subscales, it is possible to identify four types of attachment: 1. Secure (low scores on both dimensions); 2. Avoiding / rejecting (low scores on the anxiety, and high scores on the avoidance subscale); 3. Pre-occupied (high score on the anxiety, and low on the avoidance subscale), and 4. Fearful (high scores on both dimensions). The Cronbach's  $\alpha$  for the scale in the present study was .79.

## RESULTS

Means, standard deviations, skewness, and kurtosis of all subscales of DAS, IES, Conflict Scale, and ECR are presented in Table 1. Based on a milder criterion (values between -2 and 2, Finney & DiStefano, 2006), the values of skewness and kurtosis were acceptable for all subscales of all questionnaires, indicating that data distribution does not significantly deviate from normal.

*Table 1. Descriptive indicators for DAS, IES, Conflict Scale, and ECR*

	Min	Max	M	SD	$\alpha$	Skewness	Kurtosis
Conflict	6.00	25.00	12.57	6.61	.95	.60	-1.20
IES	12.00	54.00	30.50	9.11	.82	-.14	-.55
Anxiety	9.00	48.00	19.64	7.63	.71	1.26	1.65
Avoidance	9.00	46.00	23.59	9.99	.78	.24	-1.27
Relationship quality	68.00	139.00	112.04	14.37	.88	-.78	-.09

Based on the previous results, the first goal of this study was to examine the relationship between Facebook use and relationship characteristics. For the first hypothesis, we expected that women use Facebook and post the relationship status and pictures with a partner more often than men. Results showed that there were significant gender differences in Facebook use, with large effect size and posting pictures with a partner, with moderate effect size. Women use Facebook more often than men ( $M_{\text{women}}=6.83$ ,  $SD_{\text{women}}=3.15$ ;  $M_{\text{men}}=3.71$ ,  $SD_{\text{insecure}}=2.63$ ) and post pictures with their partner more often than men. There were no significant gender differences in posting relationship status. Also, there were no significant differences in posting relationship status and pictures with a partner between persons with secure and insecure attachment style (Table 2). The hypothesis that more frequent use of Facebook is related to lower relationship quality was not confirmed ( $r=.12$ ,  $p>.05$ ).

*Table 2. Gender and attachment style differences in Facebook use, posting pictures with partner and relationship status*

Gender differences	df	t	Cohen's d
Facebook use	199	-7.61*	1.07
	df	$\chi^2$	Cramer's V
Posting pictures with a partner	3	7.87*	.20
Posting relationship status	1	.58	.05
Differences between secure and insecure attachment style	df	$\chi^2$	Cramer's V
Posting relationship status	1	2.13	.10
Posting pictures with a partner	3	1.51	.08

\* $p < .05$

The second goal of this study was to examine the relationship between attachment style and Facebook-related behaviors. We expected that men and women with insecure attachment styles more often involve in Facebook monitoring and have more conflicts over Facebook use than men and women with a secure attachment style. Using criteria for the classification of attachment style by Brennan, Clark, & Shaver (1995), in this research, there were 64.7% of persons with secure and 35.3 % of persons with insecure attachment style. Results showed that there were significant differences between persons with secure and insecure attachment style in Facebook monitoring, with persons with insecure attachment style engaging in Facebook monitoring more often ( $M_{\text{secure}}=29.52$ ,  $SD_{\text{secure}}=9.04$ ;  $M_{\text{insecure}}=32.30$ ,  $SD_{\text{insecure}}=9.02$ ). It is important to note that effect size can be considered as small. There were no significant differences between persons with secure and insecure attachment in conflicts over Facebook use (Table 3).

*Table 3. Differences between attachment styles in Facebook monitoring and conflicts over Facebook use.*

Differences between attachment styles	df	t	Cohen's d
Facebook monitoring	199	-2.09*	.30
Conflicts over Facebook use	199	-1.13	.16

\* $p < .05$

The last goal of this study was to examine the contribution of conflicts over Facebook use and Facebook monitoring to the prediction of the relationship quality, relative to the attachment style. Based on the previous research (Papp, Danielewicz, & Cayemberg, 2012), we expected that among persons with insecure attachment, Facebook monitoring and conflicts over Facebook use significantly predict the relationship quality, while among persons with secure attachment styles, only conflicts over Facebook use significantly predict the relationship quality. Intercorrelations of variables of conflict over Facebook use, IES, Anxiety, Avoid-

ance, and relationship quality are presented in Table 4. For the last hypothesis, we used the regression analysis for participants with secure and insecure attachment style separately. Results showed that in both attachment styles, only conflicts over Facebook use significantly predict relationship quality (see Table 5). It is important to note that, among participants with an insecure attachment style, the model explained 37% of the variance, while among participants with insecure attachment style, and the model explained 36% of the variance.

*Table 4. Intercorrelations of variables of conflict over Facebook use, IES, Anxiety, Avoidance, and relationship quality*

	1.	2.	3.	4.	5.
1. Conflict	--	.64**	.38**	.66**	-.61**
2. IES	.53**	--	.44**	.35**	-.44**
3. Anxiety	.13	.39**	--	.43**	-.37**
4. Avoidance	.02	-.21	-.74**	--	-.49**
5. Relationship quality	-.59**	-.20	-.20	.10	--

Note: correlations for persons with a secure attachment style are presented above the diagonal, and correlations for persons with an insecure attachment style are presented below the diagonal  
\*\*  $p < .001$

*Table 5. Regression analysis: Prediction of relationship quality based on Facebook monitoring and Facebook-related conflicts*

Predictors	Secure attachment style		Insecure attachment style	
	$\beta$	t	$\beta$	t
Facebook monitoring	-.09	-.98	.16	1.37
Facebook-related conflicts	-.55**	-6.03	-.67**	-5.86
	$R^2 = .374$		$R^2 = .362$	
	F(2,127) = 37.998, $p < .001$		F(2,68) = 19.302, $p < .001$	

## DISCUSSION

The research was conducted to determine the relationship between the use of social networking sites and the quality of the romantic relationship. Based on the results of previous research (Park, Kee, & Valenzuela, 2009; Papp, Danielewicz, & Cayemberg, 2012), we assumed that there would be significant gender differences in the frequency and manner of using Facebook and its features, that there would be a significant role of attachment style in the degree of Facebook monitoring and Facebook-related conflicts, and that Facebook monitoring and Facebook-related conflicts will significantly predict relationship quality.

The results confirmed the assumption of this research that women use Facebook and post the relationship status and pictures with a partner more often than men. These results are consistent with the results of previous studies (Park, Kee, & Valenzuela, 2009). However, it was not con-

firmed that more frequent use of Facebook is related to lower relationship quality and that people with an insecure attachment style more often post the relationship status and pictures with a partner than people with a secure attachment style. These results are inconsistent with the results of previous studies suggesting that people with insecure attachment on social networking sites show behavior that indicates the desired closeness and fear of abandonment, such as the high visibility of a romantic relationship closely (Fox & Warber, 2013; Marshall et al., 2013; Muise, Christofides, & Desmarais, 2014). The obtained results can be explained from the methodological point. Namely, the sample in the research consisted of individuals, and not couples. It is possible that these differences exist within a romantic relationship, and that the use of Facebook features in the context of romantic relationships is influenced by a combination of partner attachment styles, rather than by the attachment style of individuals. Future research should include couples and use a dyadic analysis to provide a more detailed insight into this relationship.

The results of this study have confirmed the assumption that there are significant differences in the level of Facebook monitoring between people with secure and insecure attachment style. People with insecure attachment style engage in Facebook monitoring more often. The results of the previous research consistently pointed out that people with insecure attachment often monitor the behavior of the partner on social networking sites (Fox & Warber, 2013; Marshall et al., 2013; Muise, Christofides & Desmarais, 2014). However, this research did not include the reasons for the partner's monitoring among people with insecure attachment styles. Future research should address the question of whether people with insecure attachments styles engage in Facebook monitoring to search for signs of declining interest, or there is another explanation. Within the second goal, the results did not confirm the assumption that there are significant differences in conflicts over Facebook use between people with secure and insecure attachment style. As for the previous hypothesis, these results could be explained with the fact that this research did not include couples.

The last hypothesis of this research was that there would be a significant link between Facebook-related conflicts, Facebook monitoring and relationship quality, regarding attachment style. More precisely, it was expected that among people with insecure attachments, Facebook monitoring and conflicts over Facebook use significantly predict the relationship quality, while among people with secure style attachments, only conflicts over Facebook use significantly predict the quality of a relationship. The results showed that the model was statistically significant, with only Facebook-related conflicts as a significant predictor of relationship quality in both participants with a secure and insecure attachment style.

These results are consistent with previous research indicating that Facebook-related conflicts are associated with lower relationship satisfaction (Papp, Danielewicz, & Cayemberg, 2012) and quality (Clayton, Nagurney, & Smith, 2013). It is possible that Facebook-related conflicts actually occur among partners who are experiencing potential uncertainty regarding the stability or future of their relationship, so future research should address this issue and include relationship stability and certainty as mediating variables.

It is important to note that this research has certain methodological issues. One of the methodological issues is the convenient sample, which raises the question of the possibility of generalizing the findings to the population in our country. Future research should involve couples to examine whether similar findings are obtained in this case. It would be desirable to organize longitudinal research to monitor the frequency of these behaviors and their relationship with the relationship quality in different stages of the relationship. Also, one of the issues in this study is the fact that age and the length of relationships were not controlled in this study. More precisely, even though this study included respondents with minimum age of 18 who were in a current relationship for minimum 6 months, there was no upper limit in age or relationship length, which could affect the results. Future research should control these variables or examine their mediation effect on the relationship between Facebook-related behaviors and the characteristics of a romantic relationship.

Nevertheless, this research is one of the first research in Serbia that provides an insight into the connection between the use of Facebook and its characteristics with the quality of the romantic relationship. On a practical note, the present study contributes to the understanding of romantic relationships dynamics in the age of social networking sites, by pointing to the relational factors that are potentially at risk because of Facebook use. Knowing these factors can help us develop relevant couple therapy or interventional techniques for maintaining a healthy romantic relationship.

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## ПОВЕЗАНОСТ ПОНАШАЊА НА ФЕЈСБУКУ И КАРАКТЕРИСТИКА ПАРТНЕРСКОГ ОДНОСА

**Ивана Исаиловић, Јелена Шакотић-Курбалија**

Универзитет у Новом Саду, Филозофски факултет, Одсек за психологију,  
Нови Сад, Србија

### Резиме

Појава друштвених мрежа значајно је променила услове и начин комуникације у XXI веку, па и у партнерским односима (Rus & Tiemensma, 2017). Истраживачки налази говоре да сајтови за друштвено умрежавање играју значајну улогу у свим стадијумима развоја романтичних односа, укључујући упознавање, почетак везе,

развој, одржавање, раскид, па чак и надзирање понашања бившег партнера (Smith & Duggan, 2013).

Циљ овог истраживања био је да се утврди однос између начина коришћења Фејсбука (као једног од најпопуларнијих сајтова за друштвено умрежавање) и квалитета партнерског односа. На основу резултата претходних студија (Park, Kee, & Valenzuela, 2009; Papp, Danielewicz, & Saayemberg, 2012), претпоставили смо постојање значајних полних разлика у учесталости и начину коришћења услуга Фејсбука. Такође, претпоставили смо да стил афективне везаности игра значајну улогу у степеном надзирања партнеровог понашања на Фејсбуку и у учесталости и интензитету конфликта везаних за начин коришћења Фејсбука. Најзад, претпоставили смо да се квалитет везе може предвидети на основу степена надзирања партнера на Фејсбуку и конфликта везаних за Фејсбук.

Резултати су потврдили претпоставку да жене чешће него мушкарци користе Фејсбук, постављају јавни статус везе и објављују профилне слике са партнером, што је у складу са резултатима претходних истраживања (нпр. Park, Kee, & Valenzuela, 2009). Са друге стране, нису потврђене претпоставке да је чешће коришћење Фејсбука повезано са слабијим квалитетом везе и да су несигурно везане особе склоније да чешће објављују статус везе и профилне фотографије са партнером. Ови резултати су у нескладу са налазима претходних студија који сугеришу да се несигурно везане особе на друштвеним мрежама труде да јавно истакну своју повезаност са романтичним партнером због појачане потребе за блискошћу и страха од напуштања (Fox & Warber, 2013; Marshall et al., 2013; Muise, Christofides, & Desmarais, 2014). Резултати су потврдили претпоставку да су особе са несигурним стилем везаности склоније да надзиру понашање свога партнера на Фејсбуку, што је у складу са налазима претходних истраживања (Fox & Warber, 2013; Marshall et al., 2013; Muise, Christofides & Desmarais, 2014). Међутим, није потврђена хипотеза о постојању значајних разлика у постојању конфликта везаних за употребу Фејсбука међу особама са сигурним и несигурним обрасцима афективне везаности.

Последња истраживачка хипотеза односила се на постојање значајних веза између стила афективне везаности, конфликта везаних за употребу Фејсбука, надзирања партнеровог понашања на Фејсбуку и квалитета везе. Тачније, очекивали смо да су на подзоруку несигурно везаних испитаника и конфликти везани за употребу Фејсбука и степен надзирања партнеровог понашања на Фејсбуку значајни показатељи квалитета везе, док је међу сигурно везаним испитаницима значајан показатељ квалитета везе само постојање несугласица и конфликта везаних за коришћење Фејсбука (нпр. неслагање око коментара које један од партнера оставља на профилима својих пријатеља и сл.). Резултати показују да је у обе групе испитаника само постојање конфликта везаних за употребу Фејсбука значајан показатељ квалитета везе, док се степен надзирања партнеровог понашања на друштвеним мрежама није показао као значајан показатељ квалитета везе ни код сигурно, а ни код несигурно везаних испитаника.

Ова студија је једна од првих у Србији која се бави повезаношћу активности на Фејсбуку са квалитетом романтичне везе, те, и поред одређених методолошких ограничења наведених у раду, указивањем на могуће факторе ризика који су последица коришћења Фејсбука, доприноси бољем разумевању динамике партнерских односа.

**ЕКОНОМИЈА**  
**ECONOMICS**



## IDENTIFICATION AND ASSESSMENT OF CURRENCY CRISES IN THE REPUBLIC OF SERBIA

Milan Marković<sup>1\*</sup>, Ivana Marjanović<sup>2</sup>

<sup>1</sup>University of Niš, Innovation Center, Niš, Serbia

<sup>2</sup>University of Niš, Faculty of Economics, Niš, Serbia

### Abstract

The aim of the paper is to identify the episodes of currency crises in the Republic of Serbia using the exchange market pressure (EMP) index. The country's resilience to currency crises prevents the collapse of the currency and the transfer of negative effects to the entire financial and real sector, so the research and assessment of the factors of currency crises is extremely important. The survey shows that the strongest strikes on the Serbian dinar were in the period of the global financial crisis in 2008, so that adjusting to shocks from abroad is crucial for the sustainability of the applied managed floating exchange rate regime. On the other hand, the stability of the national currency depends mainly on the achieved macroeconomic results, which are presented globally using the misery index.

**Key words:** currency crisis, floating exchange rate, foreign exchange reserves, exchange market pressure (EMP) index, misery index.

## ИДЕНТИФИКОВАЊЕ И ОЦЕНА ВАЛУТНИХ КРИЗА У РЕПУБЛИЦИ СРБИЈИ

### Апстракт

Циљ рада јесте уочавање епизода валутних криза у Републици Србији коришћењем индекса притиска на девизно тржиште (ИПДТ). Отпорност земље валутним кризама онемогућава слом валуте и пренос негативних ефеката на целокупни финансијски и реални сектор, тако да су истраживање и оцена фактора валутних криза од изузетне важности. Рад показује да су најјачи удари на динар у Србији били у периоду настанка светске финансијске кризе из 2008. године, тако да је прилагођавање шоковима из иностранства од пресудног значаја за одрживост примењеног режима руковођеног флукутирајућег девизног курса. Са друге стране, стабилност националне валуте зависи углавном од постигнутих

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\* Аутор за кореспонденцију: Милан Марковић, Универзитет у Нишу, Иновациони центар, Универзитетски трг 2, 18000 Ниш, Србија, markovicmilan89@gmail.com

макроекономских резултата, који се у глобалу приказују помоћу индекса мизерности.

**Кључне речи:** валутна криза, флукутирајући девизни курс, девизне резерве, индекс притиска на девизно тржиште (ИПДТ), индекс мизерности.

## INTRODUCTION

Each country faces the problem of selecting an adequate exchange rate regime. The optimal solution is made depending on the existing structural characteristics of the specific economy. There is a general rule that small open economies facing internal problems choose a fixed exchange rate. However, in many basic models of currency crises, monetary authorities enforce unsustainable macroeconomic policies that lead to the fixed exchange rate regime to be abandoned over time (Obstfeld, 1994).

Although a fixed exchange rate may be a stabilizing factor bearing in mind the visible monetary stability, its inflexibility leads to a deviation from the real exchange rate. In fact, the fixedness of the exchange rate spends the central bank's foreign currency reserves due to, for example, the balance of payments deficit. However, the floating exchange rate also shows some anomalies from the point of view of this research. It is true that in this exchange rate regime, the possibility of domestic currency being overstated is diminished. But there is also a great opportunity for the pursuit of speculative transactions while the domestic economy is under considerable influence of changes in the world market. Namely, capital liberalization undoubtedly contributed to both the fixed and floating exchange rate regime being equal to the target of speculators, as well as all possible modalities of foreign exchange rates in general.

The possibility of a currency crisis arises whenever the exchange rate is rising rapidly (direct notation - the depreciation of the national currency). This means that in the floating exchange rate regime, it is possible to expect a currency collapse. This is true for countries with low production and geographical diversification of exports (the case of Serbia), as well as for those with a huge budget deficit and external debt relative to gross domestic product. Under the conditions of developed international economic and financial relations, the currency crisis is spreading rapidly. The paper will show the possibility of currency crises in the floating exchange rate regime, the basic internal and external determinants of the outbreak of currency crises in the Republic of Serbia, as well as assess the exposure of the Serbian economy to currency disturbances based on the exchange market pressure (EMP) index and other indicators. The goal is to discover the causes of previous currency crises in order to act in a timely and adequate manner in the future.

### *THEORETICAL FRAMEWORK OF CURRENCY CRISES*

The expansionary monetary and fiscal policy, according to the models of the first generation of currency crises (deterministic theory of currency crises), results in a constant and often irrecoverable loss of foreign currency reserves by the monetary authority (Ćirović, 2000). *Krugman* defines the first generation of currency crises related to the fixed exchange rate regime in the following way:

“The old models of currency crises are based precisely on the thesis that countries have an uncontrolled need to monetize their budget deficits and thus face the crisis in order to defend the fixed exchange rate.” (Krugman, 1996, p. 345)

According to models of the second generation of currency crises, emphasis is put on the expectations of market players as to whether there will be an excessive expansion of the loan and whether the currency crisis will be transferred from other countries (Ćirović, 2000). It is also important to assess the ability of the central bank to defend the exchange rate. In this sense, the crises are self-fulfilling and can arise in all economies where there is an expectation that depreciation of the national currency will occur in the future period.

Expansionary economic policy is not sustainable in the long run in countries with balance of payments problems. Monetary problems of the country often denote the impossibility of achieving currency stability. The inadequate foreign exchange policy of national central banks can significantly contribute not only to the currency, but also to the economic crisis. Therefore, the International Monetary Fund monitors and controls the monetary situation of many countries in the world, primarily monetary movements in developing countries. Structural reforms, consolidation of public finances and the maintenance of monetary stability are proposed.

In the conditions of globalization of financial markets and the liberalization of capital movements, the space for the movement of speculative capital is expanding. Currency crises from one market are transferred to financial markets in other countries. Taking into account the factors of one of the biggest currency crises in history, *Bustelo* emphasizes the following:

“One of the main messages of the East Asian financial crisis is that ruthless and insufficiently measured financial liberalization drastically increases the sensitivity to speculative attacks” (Bustelo, 1998, p. 22).

Foreign short-term capital often attacks currencies that are already slightly underestimated, anticipating that this underestimation is higher. The main goal is to make a profit - to buy foreign currency cheap (so-called long position), and sell them at a higher price (the so-called short position).

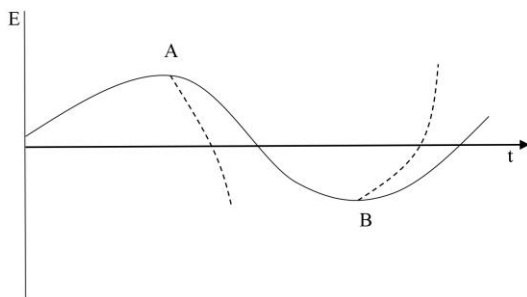
The Republic of Serbia has an underdeveloped and shallow foreign exchange market, so it is faced with a much greater possibility of exchange rate fluctuations. Capital inflows are a necessary condition to cover the current account deficit, but if most of that capital is speculative capital, it can lead to economic and financial collapse. On the other hand, the inflow of long-term capital (foreign direct investment, long-term loans) is significantly less dangerous for monetary stability due to its long-term nature.

The weak financial sector, the balance of payments deficit (primarily the trade deficit, above all) and the high public debt ratio represent unfavorable characteristics of the economy, which in this case cannot be immune to the spread of currency crises. Therefore, the increase in exports, as the best source of foreign exchange, is a key solution for reducing the deficit, but also for long-term financial stability (Marković, & Marković, 2015).

Currency crises are most often associated with the regime of fixed exchange rates. However, this does not mean that countries with a variable exchange rate are immune to the impact of speculative capital. Such countries do not have the obligation to defend the established parity, but occasionally intervene to ensure the stability of the exchange rate, as the most important price in the national economy. Here, the central bank is not obliged to maintain a constant value of the national currency because stability does not mean the invariable exchange rate. In the Republic of Serbia, the central bank has no obligation to defend the exchange rate, but it often intervenes to prevent excessive daily oscillations. The instability of the foreign exchange rate, as *Miljković* points out, is the main factor of speculative attacks in this exchange rate regime and states the following:

“The space for speculative attacks in the floating exchange rate regime opens with seasonal and cyclical oscillations of exchange rates, which are the result of seasonal and cyclical fluctuations in income and payments based on economic transactions of a foreign country.” (Miljković, 2007, p. 342)

The following chart shows the destabilizing effect of attacks on speculative capital in the country with the adopted floating exchange rate regime.



*Graph 1. Destabilizing effect of speculative capital in the floating exchange rate regime*

*Source: Miljković, 2007, p. 343.*



During the period when the country has greater liabilities than claims from abroad, the foreign exchange market experiences a higher demand for foreign currency and the weakening of the national currency value. Thus, the national currency is in the phase of depreciation because companies increase the demand for foreign currency in order to settle their obligations abroad. Speculators in point A sell foreign currency (at a higher exchange rate - E). That is the point, i.e. the moment for the attack of speculative capital. They expect the appreciation of the national currency due to seasonal opportunities. Due to these speculative activities, the exchange rate significantly drops than would have been in the case of normal, usual seasonal changes. Therefore, the curve becomes significantly steeper (dashed line) in relation to the (full) curve representing normal seasonal shocks.

Conversely, if they predict depreciation of the national currency, speculators increase the demand for foreign currency (point B). That is why the exchange rate goes quite high. In particular, the negative situation is that when the effect of recognition and other market participants assume that the exchange rate will increase. When assessing an adequate moment, speculators are now carrying out opposite transactions. They sell foreign currency at a significantly higher price and generate quite a few margins.

The statement is simple: speculative capital causes even higher oscillations of the exchange rate relative to those normal that would happen in the case of seasonal changes. All this analysis tells us that in the floating exchange rate regime there can be a destructive effect of speculative attacks on the foreign exchange market. A floating exchange rate system increases the likelihood of currency crises in countries receiving foreign capital in large amounts and in which there is a risk of a worsening of the macroeconomic position. These are countries that are dependent on foreign capital with which they cover the current account deficit.

Bearing in mind that there is a high degree of euroization in Serbia (Stanišić, & Janković, 2014), studying the EMP index can be of great importance. In such circumstances, the currency crisis is very easily spread to the entire financial sector. Therefore, the intervention of the National Bank of Serbia in order to prevent speculative attacks, within the policy of the managed floating exchange rate, are very important. They are manifested through the sale and purchase of foreign currency in the foreign exchange market.

### *METHODOLOGY*

One of the most used tools used in estimating the potential currency crisis is the EMP index. Eichengreen, Rose and Wyplosz (1996) state that the examination of the movement of the EMP index is very important for assessing the country's resistance to financial crises. Also, Tatomir

(2009) in his study points out that tensions on foreign exchange markets can often create strong currency pressures.

Girton and Roper (1977) are the authors who first used this index. The most common formula for the EMP index is calculated as follows (Kaminsky, Lizondo, & Reinhart, 1998; Tatomir, 2009; Nikolić, 2009):

$$EMP_t = \frac{\Delta e_t}{e_{t-1}} - w \frac{\Delta R_t}{R_{t-1}}$$

where:

$EMP_t$  - exchange market pressure index (on a monthly basis),

$\Delta e_t$  - monthly change in the nominal exchange rate,

$e_{t-1}$  - the nominal exchange rate of the dinar against the euro in the previous month,

$w$  - the ratio of the standard deviation of the rate of change in the nominal exchange rate of the dinar against the euro and the standard deviation of the rate of change in foreign currency reserves at the monthly level, i.e.

$$w = \sigma re_t / \sigma rR_t,$$

$\Delta R_t$  - monthly change in the level of foreign exchange reserves,

$R_{t-1}$  - the level of foreign currency reserves in the previous month.

It contains the basic variables on the basis of which the currency crisis is defined, which is the sudden depreciation of the national currency and the sharp fall in the level of foreign exchange reserves. This causes this index to be higher, increasing the chances of speculative attacks.

The currency crisis begins as soon as the value of the EMP index (at the monthly level) exceeds a certain threshold. This value is most often obtained as the sum of 3 standard deviations of the EMP index at the monthly level and the arithmetic mean of this index for the entire period of research (although there are studies that define a lower threshold, e.g. 2 standard deviations).

“The main factor influencing the expectations of investors and speculators is the “unfavorable” news about some economic fundamentals (inflation, budget deficit, currency overestimation, the risk of over-indebtedness, and the like).” (Nikolić, 2009, p. 85)

Therefore, the indicator will be introduced in the analysis - the misery index, which contains the main indicators of macroeconomic efficiency.

The misery index reflects the state of the economy and the success in managing economic policy. In addition, it also shows the economic dimension of the quality of life of the population (Cavanaugh, & King, 1988), and is often used in the analysis of poverty in some countries. The original version of the index was defined by *Okun* as a sum of annual inflation rates and unemployment rates, while economist *Barro* expanded the coverage of this index by introducing the interest rate and growth rate of the real gross domestic product (Ewa, 2009). After some modifications, the final version of

this index to be used in the research is (Rađenović, & Kostić, 2015; Kolaneci, Duzha, & Lika, 2016):

$$\text{Misery index} = \text{unemployment rate} + \text{inflation rate} + \text{interest rate} \\ - \% \Delta \text{ in real gross domestic product}$$

The reference interest rate was taken for the interest rate. Sources of data were obtained from the database of the National Bank of Serbia. These data include the following indicators: the monthly level of foreign currency reserves expressed in euros, the nominal exchange rate of the dinar against the euro at the end of the month and the reference interest rate also on a monthly basis. Among other indicators aside, the inflation rate and the unemployment rate, both on an annual basis, as well as the valid reference interest rate at the end of the year. Data on the movement of real gross domestic product were obtained on the basis of the data of the Public Finance Bulletin of the Ministry of Finance of the Republic of Serbia. Correlation and regression analysis were used to evaluate the relationship between individual variables and the influence of the same on the EMP index. The survey covers a twelve-year period from October 2006 to September 2018.

Research hypotheses are:

H<sub>1</sub>: Currency crises are possible in the fixed exchange rate regime and also in the floating exchange rate regime,

H<sub>2</sub>: There is a weak correlation between the rate of change in the exchange rate and the rate of change in foreign reserves, which confirms the determination of the National Bank of Serbia to intervene in the foreign exchange market only to prevent speculative attacks on the daily level,

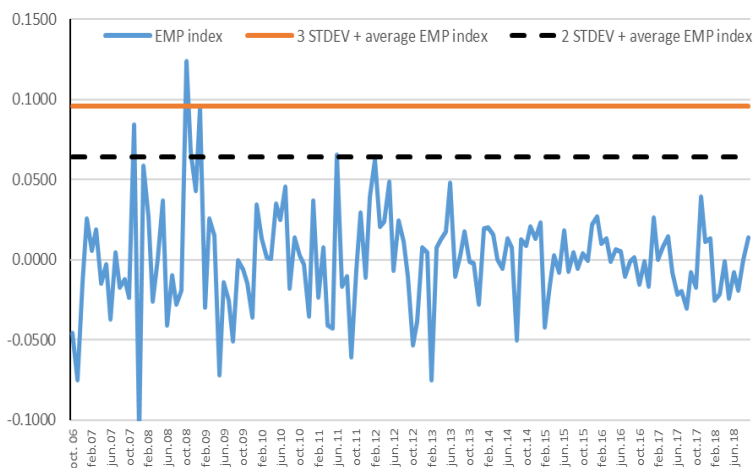
H<sub>3</sub>: External shocks significantly influence the possibility of developing a currency crisis in the Republic of Serbia.

## *RESULTS AND DISCUSSION*

Based on the survey methodology presented, the EMP index will first be calculated. In analyzing this index for the entire research period, three characteristic sub-periods can be distinguished. The first one covers the period from October 2006 to mid-2009, where the strongest pressures on the national currency are identified. The period until mid-2013 is characterized by few fluctuations in the movement of the EMP index. The most stable sub-period is related to 2014, 2015, 2016, 2017 and 2018.

The most dominant factor for instability in the first sub-period is the impact of the global economic and financial crisis. In October 2008 Serbia, according to this indicator, had strong pressures on the dinar and currency crisis. This also shows the maximum value of the EMP index recorded for this month. Slight pressures were registered in November 2007, November 2008, January 2009 and June 2011 (if the threshold drops from 3 to 2 stand-

ard deviations, they also represent periods with a currency crisis). In all these “crisis” months, the main trigger is the depreciation of the Serbian dinar. During the second sub-period, the most important determinants are internal shocks, an unstable monetary situation and a budget deficit. The period since 2014 is characterized by the extremely low values of the EMP index, without any possible currency crises. Although in theory they mostly relate to the fixed exchange rate, based on the preliminary consideration and the results of this empirical research, the hypothesis according to which currency crises are also expressed in the (managed) floating exchange rate regime is confirmed.



*Graph 2. Movement of the EMP index in the Republic of Serbia for the period from October 2006 to September 2018*

*Source: Calculation and presentation of the authors based on data from the National Bank of Serbia, 2018.*

Several studies have examined the main determinants of the EMP index (Patnaik, & Pundit, 2019; Aizenman, & Hutchison, 2012; Aizenman, Lee, & Sushko, 2012; Aizenman, & Binici, 2016; Feridun, 2009; Patnaik, Felman, & Shah, 2017), whereby the level of GDP, current account balance as a percentage of GDP (CAB), public debt as a percentage of GDP (PD), foreign exchange reserves as a percentage of GDP (FERGDP) and inflation (INF) were revealed to be the most prominent. Therefore, the influence of these variables on the EMP index in the Republic of Serbia is examined. The following regression model is formed:

$$EMP_t = \beta_0 + \beta_1 GDP_t + \beta_2 CAB_t + \beta_3 PD_t + \beta_4 FERGDP_t + \beta_5 INF_t + \varepsilon_t$$

The results of the augmented Dickey-Fuller test indicate that the variables in the regression analysis are non-stationary at level, but stationary at first differences. Therefore, it is necessary to test for cointegration. The Johansen’s test indicates that there are no cointegrating equations, therefore,

the model with the first differences is evaluated. To examine the validity of the model, autocorrelation, multicollinearity and heteroscedasticity are tested. Since the model suffers from heteroscedasticity the regression model is assessed using the Newey-West estimation procedure and the results are presented in Table 1.

*Table 1. Results of the estimated regression model*

	Coef.	Newey-West Std. Error	t	Sig.	95% Confidence Interval	
					Lower Bound	Upper Bound
GDP	.00000045	.00000013	3.47	.001	.00000019	.00000071
CAB	46.25627	16.72461	2.77	.006	13.17791	79.33463
PD	6.126626	4.74529	1.29	.199	-3.258731	15.51198
FERGDP	-0.260691	.0344339	-7.57	.000	-.3287952	-.1925866
INF	-.000291	.0016437	-.18	.860	-.0035417	.0029602
constant	-.000835	.0026436	-.32	.753	-.0060633	.004394

*Source: Authors' calculation*

The obtained results show that changes in the level of GDP, current account balance and foreign exchange reserves represent significant determinants of the EMP index in the Republic of Serbia, while inflation and public debt do not have significant influence. As for the impact of perceived relationships, it can be noticed that the changes in the level of GDP and current account balance have a positive influence on the EMP index, while the foreign exchange reserves (as a percentage of GDP) have a negative influence on the value of the EMP index. The estimated model is statistically significant at the significance level of 1% ( $F(5, 134) = 28.93$ ,  $\text{Prob} > F = 0.0000$ ), with the adjusted R squared of 37.17%. Therefore, in predicting the EMP index, it is also important to consider changes in the GDP, current account balance and particularly, foreign exchange reserves.

Along with the assessment of the movement of the EMP index, it is necessary to observe the movement of the exchange rate. Analyzing the nominal exchange rate movements with a monthly level, it becomes clear that there has been a high level of stability since mid-2013. In the period from 2007 to 2012, the dinar depreciated against the euro by 43.95%, while for the next six-year period it lost value by only 6.02%.

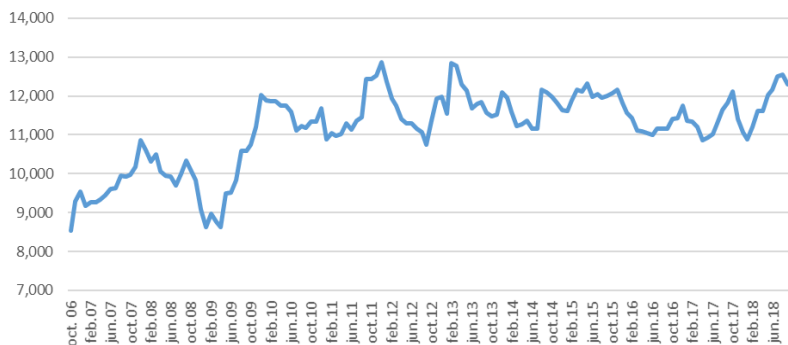
Changes in the level of foreign exchange reserves are recorded in the following graph. Compared to October 2006, the level of foreign exchange reserves increased and at the end of the research period amounted to EUR 12,302 million, an increase of 44.28%. However, although the correlation coefficient between the rate of change in foreign exchange reserves and the exchange rate is negative, there is a very weak link, because it is only -0.20. This leads to the conclusion that foreign exchange reserves are used only to suppress excessive fluctuations in the exchange rate on a daily basis, which is the goal of the policy of the managed floating exchange rate. Therefore, the policy of the National Bank of Serbia was conducted in order to preserve the

stability of the exchange rate, and not its invariability, so that the second hypothesis of the research was confirmed.



*Graph 3. Movement of the monthly exchange rate of the dinar against the euro in Serbia in the period from October 2006 to September 2018 (end of the period)*

*Source: Authors' presentation based on data from the National Bank of Serbia, 2018.*

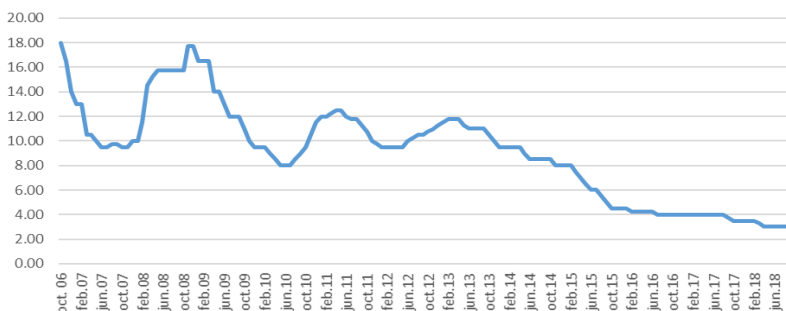


*Graph 4. Changes in the level of foreign exchange reserves in Serbia in the period from October 2006 to September 2018 (in millions of EUR)*

*Source: Authors' presentation based on data from the National Bank of Serbia, 2018.*

The reference interest rate (Graph 5), used by the National Bank of Serbia as a money supply regulator, was not directly related to changes in the foreign exchange market and the removal of existing pressures. This means that this instrument was not used (in addition to foreign exchange reserves) in order to stabilize the foreign exchange rate. This fully corresponds to the aforementioned euroization of the Serbian economy, which leads to the conclusion that monetary policy becomes inefficient in that case. On the other hand, it is clear that the exchange rate channel is dominant. The correlation coefficient between the rate of change in the nominal exchange rate of

the Serbian dinar against the euro and the reference interest rate at the monthly level for the stated research period amounted to only -0.10.



*Graph 5. Movement of reference interest rates on a monthly basis in Serbia for the period from October 2006 to September 2018*

Source: Authors’ presentation based on data from the National Bank of Serbia, 2018.

In more detail, in order to assess the relationship between the exchange rate (ER) and foreign exchange reserves (FER), as well as the relationship between the reference interest rate (RIR) and the exchange rate, a correlation analysis was used (Table 2). The results show that there is a weak inverse relationship between exchange rates and foreign exchange reserves, while the ratio between reference interest rates and foreign exchange rates, although inverse, is not statistically significant. The established relationship means that only 4.16% of the variance is common, therefore, exchange rates can explain 4.16% of the variance of foreign exchange reserves variance and vice versa.

*Table 2. Correlation between exchange rate, foreign exchange reserves and reference interest rate*

		ER	FER	RIR
ER	Pearson Correlation	1	-.204*	-.099
	Sig. (2-tailed)		.014	.237
	N	144	144	144
FER	Pearson Correlation	-.204*	1	-.072
	Sig. (2-tailed)	.014		.391
	N	144	144	144
RIR	Pearson Correlation	-.099	-.072	1
	Sig. (2-tailed)	.237	.391	
	N	144	144	144

Source: Authors’ calculation

Unlike the EMP index that reflects the success in monetary policy management, the misery index shows the “state of health of the economy” and reflects the efficiency of the country’s overall economic policy. The fol-

lowing table (Table 3) computes the values of this index for the entire analysis period. Starting from 2012, when the highest index was registered, there is a continuous decrease trend, which reflects the improvement of the economic situation from year to year. This is the result of well-conducted, primarily fiscal policy, monetary policy, and structural reforms implemented, which is reflected in the reduction of unemployment. In order to lower this index to below 10%, it will be necessary to increase production, which in turn will affect further reduction of the unemployment rate. Since the misery index reflects the internal problems of the economy, it can be concluded that external shocks significantly influence the possibility of a currency crisis, which is in line with the third hypothesis of the research. In 2010 and 2012, the values of this indicator were the highest, but the value of the EMP index was lower and did not exceed the previously defined limit values, as was the case in 2007 and 2008, when there were strong external pressures. The inflation rate was the leading factor in the high misery index, which only affected the depreciation of the national currency, 10.02% in 2010 and 8.67%, in 2012.

*Table 3. Misery index of the Republic of Serbia  
in the period from 2007 to 2018*

Year	Unemployment rate	Interest rate	Inflation rate	The rate of change in real GDP	Misery index
2007	18,1	10,00	11,0	5,9	33,20
2008	13,6	17,75	8,6	5,4	34,55
2009	16,1	9,50	6,6	-3,1	35,30
2010	19,2	11,50	10,3	0,6	40,40
2011	23,0	9,75	7,0	1,4	38,35
2012	23,9	11,25	12,2	-1,0	48,35
2013	22,1	9,50	2,2	2,6	31,20
2014	19,2	8,00	1,7	-1,8	30,70
2015	17,7	4,50	1,5	0,7	23,00
2016	15,3	4,00	1,6	2,8	18,10
2017	13,5	3,50	3,0	1,9	18,10
2018	11,9*	3,00*	2,1*	4,2**	12,80

*Source: Calculation and presentation of authors based on data from the National Bank of Serbia, 2018, and the Ministry of Finance, 2018.*

*Note: the latest available data (\*) and projection (\*\*) according to the same sources*

## CONCLUSION

Currency crises affect almost all countries. That is why monetary authority must act preventively. In this regard, the emphasis is on control of short-term placements from abroad, as well as the increase of required reserves for these assets. Simultaneous internal and external equilibrium is the key objective of the country not to receive a currency crisis. Currency



crises are often the result of expansively guided fiscal and monetary policy, so measures are required in order to reduce aggregate demand.

A speculative attack is not a necessary condition for the manifestation of the currency crisis. But, based on empirical research, it is an unavoidable factor in the creation or stimulation of the development of currency crises. Developing countries and countries with monetary problems are the ideal ground for the arrival of foreign speculative capital that destroys the monetary system of these countries and prevents the sustainability of currency stability. According to many, the inflow of speculative capital is an additional factor that further deepens the currency crisis. The central bank is the main institution responsible for defending the economy from speculative attacks. The central bank must defeat speculators with its wise policy. The precondition for this is that the central bank has a large volume of foreign exchange reserves.

The survey showed that most of the values of the EMP index were recorded in the period when the global financial crisis came to Serbia (from October 2008 to January 2009), so that the main factor in the eventual currency crisis is disturbances from abroad. They significantly affect the depreciation of the dinar (in the period from 2007 to 2012, the dinar depreciated against the euro by almost 44%), and foreign exchange reserves and the change in the reference interest rate were not significantly used in this context bearing in mind the correlation coefficient at the monthly level.

In addition to fiscal adjustment programs, many requirements of international financial institutions, in the event of currency crises, involve the introduction of a currency board. However, this option brings with it many challenges although it largely stabilizes the exchange rate. It is a particularly negative circumstance when such exchange rates are defended over high real interest rates. In this case, a favorable climate for the arrival of short-term speculative capital is created. After the high rates of inflation until 2012, discussions were held in Serbia on the introduction of a crawling band or even a fixed exchange rate regime. However, starting from 2013, inflation has been at the level of the European average, and the overall internal macroeconomic balance has also been achieved. During this period, the Serbian dinar weakened against the euro by only 6%.

**Acknowledgment:** The paper is a part of the research financed by the Ministry of Education, Science and Technological Development of the Republic of Serbia (Agreements No. 451-03-9/2021-14/200371 and No. 451-03-9/2021-14/200100).

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## ИДЕНТИФИКОВАЊЕ И ОЦЕНА ВАЛУТНИХ КРИЗА У РЕПУБЛИЦИ СРБИЈИ

Милан Марковић<sup>1</sup>, Ивана Марјановић<sup>2</sup>

<sup>1</sup>Универзитет у Нишу, Иновациони центар, Ниш, Република Србија

<sup>2</sup>Универзитет у Нишу, Економски факултет, Ниш, Република Србија

### Резиме

Сагледавајући различите генерације валутних криза, валутне кризе представљају резултат погрешно вођене макроекономске политике, као и спољних шокова који се огледају кроз шпекулативне нападе на валуту, односно монетарни систем земље. Истраживање показује да су валутне кризе могуће подједнако и у режиму фиксног и у режиму флукутирајућег девизног курса. Република Србија се определила за управљано флукутирајући девизни курс, тако да је задатак Народне банке Србије да одржи стабилан девизни курс у циљу избегавања шпекулативних напада на валуту, али не да утиче директно на његов ниво, који се формира на основу кретања понуде и тражње на девизном тржишту. О томе говоре резултати корелационе анализе, тј. да је кретање девизних резерви слабо повезано са порастом номиналног девизног курса у Републици Србији (изузев код периода са валутном кризом).

Индекс притиска на девизном тржишту јесте најкоришћенији алат за процену настанка валутне кризе. Према овом индексу од октобра 2006. године, па до септембра 2018. године, октобар 2008. године био је најкритичнији са становишта валутне стабилности услед наглог слабљења динара. Основни фактор који је доминирао у овом периоду (крај 2008. и почетак 2009. године) јесу шокови из иностранства, услед преноса ефеката светске економске и финансијске кризе. Како је канал девизног курса у Републици Србији јако активан услед високог степена незваничне евроизације, веома је битна стабилизација девизног курса која се манифестовала у другој половини анализаног периода, што је резултат одговорно вођене фискалне, монетарне и девизне политике. О томе сведочи и индекс мизерности, који је од 2013. године у континуираном паду. Он је, између осталог, показатељ ефикасности економске политике једне земље. Међутим, истраживање је показало да стање у домаћој економији није од пресудног значаја за могућност јављања валутне кризе, јер су у 2010. и 2012. години остварене највише вредности индекса мизерности, а то се (и по-

ред високе депресијације српског динара у овим годинама) није одразило на прелазак индекса притиска на девизно тржиште изнад претходно дефинисаног прага. Ипак, консолидација јавних финансија може побољшати очекивања тржишних субјеката и онемогућити велике осцилације у кретању капитала.

## THE FUNCTION OF PROTECTED NATURAL AREAS OF THE VOJVODINA PROVINCE IN SUSTAINABLE TOURISM DEVELOPMENT

Igor Trišić\*

The University of Kragujevac, Faculty of Hotel Management and Tourism,  
Vrnjačka Banja, Serbia

### Abstract

To determine the state of sustainable tourism development in the protected natural areas of AP Vojvodina, it is important to analyze and correlate certain indicators of sustainable tourism. It is also important to analyze the opinion of visitors according to the selected protected natural areas, from the perspective of experiences and potential suggestions for specific interventions, to improve the state of natural values and improve the area protection. As a final result, it can provide significant benefits for all participants of sustainable tourism development. This paper analyzed and presented the results of visitor responses regarding 5 selected protected natural areas on the territory of AP Vojvodina. These areas represent a significant sample for analysis and the results of the research can influence the overall assessment of the sustainable tourism development of the Province. Using the correlation method of obtained average values of estimated sustainability indicators, the relation of these indicators to sustainable tourism was defined. The results obtained can influence the constitution of proposals for the improvement of the natural values of these areas through the proper implementation of nature protection. By enhancing these natural values, benefits are provided to all participants in sustainable tourism development.

**Key words:** sustainable tourism development, protected natural areas, nature-based tourism, AP Vojvodina, Pearson Correlation.

## ФУНКЦИЈА ЗАШТИЋЕНИХ ПРИРОДНИХ ПОДРУЧЈА ВОЈВОДИНЕ У ОДРЖИВОМ ТУРИСТИЧКОМ РАЗВОЈУ

### Апстракт

За утврђивање стања одрживог туристичког развоја у заштићеним природним просторима АП Војводине, значајно је извршити анализу и корелацију од-

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\* Аутор за кореспонденцију: Игор Тришић, Факултет за хотелијерство и туризам, Војвођанска 5а, 36210 Врњачка Бања, Србија, trisici@hotmail.com

ређених индикатора одрживог туризма. Исто тако, важно је анализирати ставове посетилаца одабраних заштићених природних простора, са аспекта искустава и могућих сугестија ка одређеним интервенцијама, у циљу побољшања стања природних елемената и унапређења заштите простора, што као коначни резултат може дати значајне погодности за све субјекате одрживог туристичког развоја. У раду су анализирани и приказани резултати одговора посетилаца пет одабраних заштићених природних простора на територији АП Војводине. Ови простори представљају значајан узорак за анализу, а резултати могу послужити у укупној оцени одрживог туристичког развоја Покрајине. Методом корелације добијених просечних вредности оцењених индикатора одрживости дефинисан је однос ових индикатора према одрживом туристичком развоју. Добијени резултати могу утицати на конституисање предлога унапређења природних вредности ових простора кроз правилну примену заштите. Повећањем ових вредности обезбеђују се погодности свим субјектима у одрживом туристичком развоју.

**Кључне речи:** одрживи туристички развој, заштићени природни простори, туризам заснован на природи, АП Војводина, Пирсонова корелација.

## INTRODUCTION

Protected areas of the Autonomous Province of Vojvodina are certain areas with very attractive character. Many activities are limited in those areas since they can change the area and influence the natural resources and the entirety of the wildlife. Protected natural areas of Vojvodina have certain characteristics that they are protected for. Most often these indicators are as follows: rare wildlife species and their spacial vulnerability, unique areas such as wetlands, sandy and alluvial terrains, unspoiled nature and other factors. These areas often unite significant economic, cultural, scientific and ecological values of its territory (Milićević et al., 2020), and that is the reason for their preservation (Bennett et al., 2018; Stojanović et al., 2018). The concept of such area protection should allow the use of resources but only in a sustainable and renewable way (Wardle et al., 2018; Cvijanović et al., 2020). It can additionally increase the tourist value of such destinations. State, local community, conservationists, researchers and tourists using the area have interest regarding the protection and preservation of these areas. The task of this paper is the analysis and comparison of certain indicators of sustainable tourism, within 5 selected protected natural areas of the Autonomous Province of Vojvodina. After the analysis of the obtained average values from the respondents' answers, it is possible to derive the guidelines towards the improvement of sustainable tourism development. These suggestions can include different anthropogenic activities and forms of tourism. It is, also, the objective of this paper.

Protected natural areas of Vojvodina with properly planned tourism development, which includes all sustainability factors, can represent significant tourism potential (Trišić, 2020). Possible forms of tourism in these des-

tinations are ecotourism, trips, science tourism, nature-based tourism, sports tourism, evening, wine tourism, bird and animals watching, cycling, tracking, etc. All mentioned forms of tourism can contribute to the improvement of the protection of these areas (Bello, Carr & Lovelock, 2016; Buclet & Lazarević, 2017). The field of the research consisted of one national park and 4 special nature reserves, significant in terms of the offer of nature-based tourism of Vojvodina. The paper used the written questionnaire method. The respondents were asked 26 questions as part of the written questionnaire, referring to the attitudes towards the specific indicators of sustainable tourism within the visited area. Research data have been collected through a questionnaire, processed and displayed by the One-Sample Test and Pearson Correlation Analysis, which identified average values and obvious differences in displayed values of sustainable tourism development factors in selected protected areas. As the final result of the protection impact on quality and type of destination, environmental, economic and socio-cultural benefits are allocated to all participants in this unique system.

### *LITERATURE REVIEW*

In this chapter, the author reviewed relevant current research and made a connection with their research. Research by prominent author makes a significant starting point for scientific work in this paper. To understand the correlation between the protected areas and sustainable tourism development in the best possible way, it is necessary to analyze the historical data regarding the chronology of establishment of different statuses and protection regime of certain areas (Newsome, Moore & Dowling, 2013; Geneletti, Scolozzi, & Esmail, 2018). It enables the role of protected areas in the sustainable development of the AP of Vojvodina is adequately perceived (Štetić & Trišić, 2018). It is also significant to analyse the data of certain authors, who researched the relationship between sustainable tourism development and protected natural areas.

In his study, Stojanović defined and described the first forms of protection recorded in 1273 in London when the oldest protection measure was adopted, and it referred to the limitation of smoke and ash effects. Nature reserve - Forest of Fontainebleau, near Paris, was the first one with the protection status acquired in 1848, and then Yosemite Valley, in the USA, acquired it in 1864. Forest of Fontainebleau protection was the action carried out by the naturalists, artists and nature lovers. The objective was to maintain the balance in the exploitation of natural resources, because of the increasing need of the urban population for spending time outdoors (Stojanović, 2011). Soon after, inspired by these examples, all around the world protection regimes started to be established in different areas and on different levels. Protection statuses were acquired by the first national parks, and the first national park Yellowstone in the USA obtained the status on 1<sup>st</sup> March 1872,

so therefore it was the first national park in the world. In Europe, Abisko National Park in Sweden was established in 1909, and then Engadin in Switzerland in 1914 (Williams & Lew, 2015; Trišić, Štetić & Krstić, 2018). In the area of Vojvodina, Obedska Pond acquired the protection status in 1874, and it was the first form of protected area in the Republic of Serbia (Nikolić, 2006). Fruška Gora, the first national park, was established on 23<sup>rd</sup> December 1960. According to Lazić (2008), protection of natural beauty, historical monuments, wildlife and land characteristics were emphasized as the reasons for the establishment of the national park (Lazić et al., 2008). Protected natural areas have significant natural resources such as soil (Maksin et al., 2018), wetland ecosystems, diverse terrains and special representatives of flora and fauna (Trišić et al., 2020). Different proposals of measures for the improvement of these values can be constituted by the analysis and correlation of the sustainability indicators (Brandt et al., 2013; Saarinen, Rogerson & Hall, 2017). The author's Carr, Ruhanen and Whitford consider as significant that realization of ecological, economic and socio-cultural values in tourism destinations, is the basic principle of sustainable tourism development (Carr, Ruhanen & Whitford, 2016). The results of their research contributed to the research in this article.

Tourism is the direct moderator of areas (Štetić, Trišić & Nedelcu, 2019) by different influences which are the result of direct use of areas (Hall, 2010). All significant activities of tourism in the specific protected area and development risks, resulting from it, influencing the most significant elements of the environment while creating destinations, can be seen in the following Table 1.

The results of cited research contributed to the research in this article. The author researched the influence of the importance of the selected protected natural areas of Vojvodina on sustainable development.

## *METHOD*

In AP of Vojvodina there are 21 internationally important areas for birds (Important Bird Areas – IBA), a total area of 354,786ha, which together occupy 16.5% of Vojvodina's territory. Among the most significant ones are the following: Gornje Podunavlje, Karadjordjevo, Subotica lakes and sandy terrain, Jegrička, Danube loess bluffs, etc (Trišić, Štetić & Krstić, 2018). Within the IPA (Important Plant Areas) on the territory of Vojvodina, 27 areas with the total area of 328,208ha or 15.3% have been singled out. Significant IPA areas in Vojvodina are Fruška Gora Mountain, The moor of Kovilj, Obedska Pond, Imperial Pond, Salt Marshes "Slano Kopovo", Upper Danube Valley, Deliblato Sands, Zasavica Moor, Meadows of Great Bustard, Vršac Mountains, Subotica sandy terrain, Palić Lake, Ludaš Lake, etc. (Panjković, 2016). In AP of Vojvodina there are 4 Prime Butterfly Areas (PBA), a total area of 91,107ha which makes 4.2% of its territory (Stojnić et al., 2015).



*Table 1. The tourism relation to certain factors and elements of the destination*

Element	Examples of risk from tourism activities
Ecosystems	<ul style="list-style-type: none"> <li>▪ The construction of accommodation, visitor centers, infrastructure, and other services has a direct impact on the environment, from vegetation removal, animal disturbance elimination of habitats, impacts on drainage etc;</li> <li>▪ Wildlife habitat may be significantly changed (travel routes, hunting areas, breeding areas, etc.) by all kinds of tourist development and use.</li> </ul>
Soils	<ul style="list-style-type: none"> <li>▪ Soil compaction can occur in certain well-used areas;</li> <li>▪ Soil removal and erosion also occurs and may continue after the disturbance is gone.</li> </ul>
Vegetation	<ul style="list-style-type: none"> <li>▪ Concentrated use around facilities has a negative effect on vegetation;</li> <li>▪ Transportation may have direct negative impacts on the environment (e.g. vegetation removal, weed transmission, animal disturbance);</li> <li>▪ Fire frequency may change due to tourists and park tourism management.</li> </ul>
Water	<ul style="list-style-type: none"> <li>▪ Increased demands for freshwater;</li> <li>▪ Disposal of sewage or litter in rivers, lakes or oceans;</li> <li>▪ Release of oil and fuel from ships and smaller craft;</li> <li>▪ Propeller-driven watercraft may affect certain aquatic plants and species.</li> </ul>
Air	<ul style="list-style-type: none"> <li>▪ Motorized transportation may cause pollution from emissions (from the plane, train, ship or automobile).</li> </ul>
Wildlife	<ul style="list-style-type: none"> <li>▪ Hunting and fishing may change population dynamics;</li> <li>▪ Hunters and fishers may demand the introduction of foreign species, and increased populations of target animals;</li> <li>▪ Impacts occur on insects and small invertebrates, from effects of transportation, introduced species, etc;</li> <li>▪ Disturbance by visitors can occur for all species, including those that are not attracting visitors;</li> <li>▪ Disturbance can be of several kinds: noise, visual or harassing behavior;</li> <li>▪ The impact can last beyond the time of initial contact (e.g. before heart-rate returns to normal, or before birds alight, or mammals resume breeding or eating);</li> <li>▪ Marine mammals may be hurt or killed by boat impacts or propeller cuts;</li> <li>▪ Habituation to humans can cause changed wildlife behavior, such as approaching people for food.</li> </ul>

*Source: Eagles, P.F.J., McCool, S.F., & Haynes, C.D. (2002).*

*Sustainable tourism in protected areas, guidelines for planning and management. Cambridge: UNEP & WTO, p. 33.*

5,989ha has been placed under the first degree of protection (4.47% of the total number of protected areas), or 0.28% of the territory of APV. The second degree of protection has been assigned to 50,964.37ha of the protected areas (38%), or 2.4% of the territory of the AP. The third degree of protection includes 84,091.28ha of the protected areas of the APV (57.53%) or 3.88% of APV's territory.

The protection covers: 1 national park, 3 regions of exceptional characteristics, 16 specialized nature reserves, 10 nature parks, 1 scientific research reserve, 53 natural monuments, 3 memorial natural monuments, as well as natural assets of other categories (Trišić, Štetić & Krstić, 2018). Several natural areas have international status or are nominated to acquire it (Puzović et al., 2015). All the data above are shown in Table 2.

*Table 2. Overview of the number of protected areas on the territory of APV*

Type of protected	ha	Autonomous Province of Vojvodina % (Total Area)
Ramsar sites	57,255	2.65
IBA	354,786	16.41
IPA	328,208	15.18
PBA	91,107	4.22
$\Sigma_1$	831,356.00	38.46
Under the first degree of protection	5,989	0.28
Under the second degree of protection	50,964.37	3.58
Under the third degree of protection	84,091.28	4.12
$\Sigma_{1 \in \Sigma_2}$ (135 sites)	141,044.65	7.98

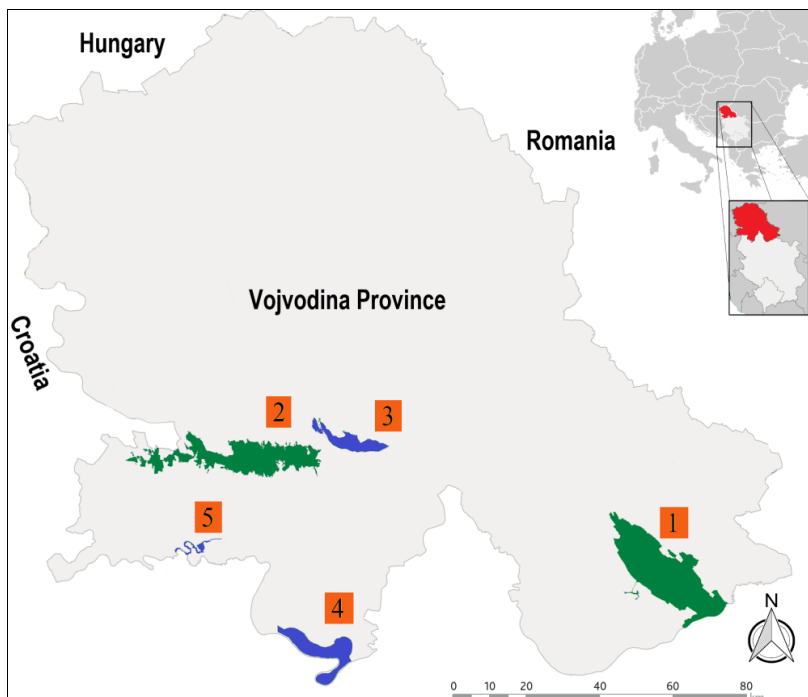
*Source: Author*

By analyzing the data in Table 1, it can be noticed that the areas under the international management regimes (Ramsar Areas, IBA, IPA, and PBA) are 690,311ha larger compared to the established regimes of I, II, and III degrees of protection, regulated by the Law on Protection of Nature of the Republic of Serbia (Zakon o zaštiti prirode ("Službeni Glasnik RS", br. 36/2009, 88/2010, 91/2010 - ispr. i 14/2016)). It is also noted that there is the case of territory overlap, that is, one territory or its part can be submitted to various types of protection. There is significant data about 135 natural sites, on the total area of 141,044.65ha, being submitted to the protection. This makes 7.98% of the total area of the Vojvodina Province (2,161,400ha). In the group of nationally and internationally significant species on the area of Vojvodina 455 taxa were recorded, in the tier of species (353) and subspecies (102). Based on Preliminary List of Species for the threat status of the Red List of Flora of Serbia – The Red Data Book of Flora of Serbia 1, according to the IUCN

criteria from 2001, that is, threat status revision of some taxa of Vojvodina, it is possible to select 270 species (Stojnić et al., 2015).

Analysis and correlation of the selected indicators of sustainable tourism have been carried out, in this paper, to determine the state of sustainable tourism development in the AP of Vojvodina. Also, the attitudes of the users of these areas have been analyzed in terms of the experience and potential suggestions towards the specific interventions for the improvement of the conditions of natural elements, state and the results of environmental protection, which can provide the increase of benefits for all entities of the sustainable tourism development as the final result (Stojanović, 2011; Holden, 2016). When the roles of every factor of sustainable tourism development are defined and determined in the selected protected areas of AP of Vojvodina, certain proposals for the constitution of systemic measures and specific objectives of protection can be given (Fennell, 2015; Trišić, 2019). Comparative analysis of these selected indicators of sustainability and their state can be used for defining the role of protected natural areas with regard to the sustainable tourism development of AP of Vojvodina. Based on the above mentioned, the research has been carried out by the author, in order to determine the significance of the specific factors within the selected protected areas. These selected protected areas can represent a significant sample for the analysis of the total state of the sustainable tourism development of AP of Vojvodina. In 2018, the questionnaire was distributed by the author among 250 users of protected natural areas during their visits or after the finished journey in the 5 selected protected natural areas of AP of Vojvodina (Figure 1). For the research in this paper, data were obtained by a written questionnaire. The questionnaire contained 26 questions in the form of statements and the respondents entered their answer to each of the statements. The field of research consisted of one national park and 4 special nature reserves, significant in terms of the offer of nature-based tourism of Vojvodina. The respondents were asked 26 questions as part of the written questionnaire, referring to the attitudes towards the specific indicators of sustainable tourism within the visited area. Respondents gave answers only regarding the state of the indicators of sustainability of the given protected areas they visited, meaning they did not visit all the suggested protected areas. With regard to the elements for examination and comparative analysis of sustainable development and protection, indicators which are an integral part of destinations, such as endangered representatives of flora and fauna, reasons for and needs of protection, degree of development and endangerment, anthropogenic influences grouped by the effect levels, methods of protection improvement if it is stable, the role of the local community and sustainable results of proper management have been taken into consideration. Respondents answered the question regarding tourist activities, and answers were ranked on a

Likert scale (Joshi et al., 2015). This ranking of answers is identical to the answers rated in the author's questionnaire, i.e. with the answers ranked by relevance on the following scale: 1 – I absolutely disagree, 2 – I disagree, 3 – I'm not sure, 4 – It's mostly true, 5 – I completely agree. By the method of data descriptive analysis using SPSS software (Statistical Package for the Social Sciences), the obtained results were examined and tabulated. Obtained differences in certain responses were examined by One-Sample Test analysis. Correlation of average indicator values was examined by the method of Analysis of The Pearson Correlation. By the method of data descriptive analysis using SPSS software, the results obtained were examined and tabulated. Obtained differences in certain responses were examined by One-Sample Test analysis. The existence of variables was examined and shown by the Pearson Correlation analysis indicators method to determine if the obtained differences model is relevant to the result analysis.



*Figure 1. Map of the study area*

*Legend: Special Nature Reserve “Deliblatska Peščara” (1); National Park “Fruška Gora” (2); Special Nature Reserve “Koviljsko-Petrovaradinski Rit” (3); Special Nature Reserve “Obedska Bara” (4); Special Nature Reserve “Zasavica” (5).*

*Source: author digitalized*

*RESULTS AND DISCUSSION*

Respondents traveled, at least once, to the selected protected areas being the subject of research and used the specific services within them. Respondents are from the following cities: Beograd, Zagreb, Beč, Banja Luka, Novi Sad, Pančevo and Niš. Each respondent stated which protected areas he/she had visited up to the moment of the survey. The structure of the respondents is shown in Table 3.

*Table 3. Respondents' profile*

Gender	Frequency	Percent	
Male	112	44.8	
Female	138	55.2	
Total	250	100.0	
Education level	Frequency	Percent	
Primary education	20	8	
Secondary education	84	33.6	
Higher education	105	42	
High education	41	16.4	
Total	250	100.0	
Age structure	N	Min	Max
	250	19	72
	mean	std. dev.	
	32.17	15.851	
Visited protected area	Responses		Percent
	Frequency	Percent	of case
National Park „Fruška Gora“	220	33.49	88.0
Special Nature Reserve „Zasavica“	198	30.13	79.2
Special Nature Reserve „Deliblatska Peščara“	157	23.90	62.8
Special Nature Reserve „Obedska Bara“	44	6.70	17.6
Special Nature Reserve „Koviljsko-Petrovaradinski Rit“	38	5.78	15.2
Total	657	100.00	274.8

*Source: Author*

For the analysis of the current state, the selected protected areas have been taken into consideration, which can represent a significant sample for determination of stability of relevant indicators of sustainable tourism (Eagles, 2014) and through which tourist destination can be successfully managed (Butzmann & Job, 2017). Obtained results, after the analysis of the responses, are shown in the form of means, by the percentage of accuracy and presence. The display of average positive and negative values and conditions, obtained after the analysis of respondents' answers, are shown in Table 4.

*Table 4. Analysis of indicators of sustainable tourism for selected protected natural areas*

Indicators	DP	FG	KPR	OB	ZA
	Average				
1. Favorable location	3.82	4.02	3.13	3.17	3.11
2. There are transport infrastructures	4.47	4.69	2.28	4.32	3.42
3. Adequate area protection status	3.54	3.17	3.67	4.47	4.06
4. International protection status	4.03	3.11	3.74	4.31	4.05
5. Sufficient number of supporting facilities constructed	3.21	3.42	2.19	4.12	3.17
6. There are accommodation facilities	4.01	3.03	2.11	2.24	2.11
7. The importance of area protection for the viability of species	4.44	3.02	4.11	4.27	4.82
8. The role of the local community is significant	3.74	4.01	4.19	4.74	4.89
9. Possible ecotourism	3.51	3.81	3.27	3.44	2.54
10. There are events	2.28	3.14	2.47	2.02	1.74
11. An adequate visitor center was built	4.44	4.11	2.44	4.32	4.84
12. Hiking and educational trails are marked	4.62	4.33	2.13	4.17	3.37
13. There are eco-trails	4.64	3.68	1.21	1.54	2.21
14. The carrying capacity is applied	3.17	2.11	1.14	2.59	3.69
15. Rare species are present	4.79	2.41	4.21	4.42	4.71
16. There are trips	4.52	4.14	4.35	4.22	4.40
17. The possibility of developing science tourism	4.81	4.80	4.62	4.82	4.91
18. The possibility of animals and bird watching	4.62	4.48	4.52	4.61	4.68
19. Waste pollution eliminated	4.54	3.11	2.52	3.81	3.09
20. There are hydrographic potentials	3.16	4.32	5.00	5.00	5.00
21. There are ethno villages	2.41	2.47	4.54	3.36	4.89
22. There are potential environmental pollutants nearby	4.54	2.14	4.37	4.50	4.71
23. Using natural resources for tourism purposes	4.16	4.12	4.57	4.11	4.54
24. Possible negative socio-cultural influences	1.29	2.12	2.37	2.25	2.11
25. There are endangered species according to IUCN	4.25	3.92	4.62	4.81	4.53
26. There are agricultural terrain nearby	5.00	4.62	5.00	4.47	4.51

*Legend: DP – Special Nature Reserve “Deliblatska Peščara”; FG – National Park “Fruška Gora”; KPR – Special Nature Reserve “Koviljsko-Petrovaradinski Rit”; OB – Special Nature Reserve “Obedska Bara”; ZA – Special Nature Reserve “Zasavica”.*

*Source: Author*

Through the analysis of Table 4, it can be observed that the indicators of sustainable tourism with highest average values marked in the protected areas are as follows: the significance of protection for species sustainability, the existence of hydrographic potential, the possibility of science tourism de-

velopment, animals and bird watching, the existence of endangered wildlife, as well as indicators referring to the infrastructure within the area. The possible threats for the protected areas, specified by the respondents, are as follows: the vicinity of agricultural terrain, the vulnerability of species with IUNC status, the use of natural resources for tourism or other purposes and the vicinity of potential environmental pollutants. The given responses referring to indicators of sustainable tourism, are statistically shown in Table 5.

Table 5. Statistics of sustainable tourism indicators

		DP	FG	KPR	OB	ZA
N	Valid	26	26	26	26	26
	Missing	0	0	0	0	0
Mean		3.96	3.46	3.38	3.73	3.92
Std. Deviation		1.076	.948	1.359	.962	1.164
Variance		1.158	.898	1.846	.925	1.354
Minimum		1	2	1	2	2
Maximum		5	5	5	5	5
Sum		103	90	88	97	102

Source: Author

Through the analysis of data in Table 5, it can be observed that Special Nature Reserve "Deliblatska Peščara" and Special Nature Reserve "Zasavica", have the highest average values. During the analysis of shown indicators, it is important to determine if there are significant differences in the answers given by the respondents. This can be determined through One-Simple Test. The analysis is shown in Table 6.

Table 6. One-Sample Test

Test Value = 0						
	t	df	Sig. (2-tailed)	Mean Difference	95% Confidence Interval of the Difference	
					Lower	Upper
DP	18,768	25	.000	3.962	3.53	4.40
FG	18,621	25	.000	3.462	3.08	3.84
KPR	12,702	25	.000	3.385	2.84	3.93
OB	19,784	25	.000	3.731	3.34	4.12
ZA	17,192	25	.000	3.923	3.45	4.39

Source: Author

Through the analysis of data in Table 6, it is concluded that there are significant differences in the respondents' answers. Those differences are observed through the analysis of average values of indicators in the protected areas. It can be examined if the obtained values are in correlation with Pearson Correlation Analysis (Table 7).

Table 7. Indicators correlation

		DP	FG	KPR	OB	ZA
DP	Pearson Correlation	1	.449*	.229	.453*	.285
	Sig. (2-tailed)		.021	.260	.020	.158
	N	26	26	26	26	26
FG	Pearson Correlation	.449*	1	.198	.405*	.106
	Sig. (2-tailed)	.021		.332	.040	.606
	N	26	26	26	26	26
KPR	Pearson Correlation	.229	.198	1	.664**	.778**
	Sig. (2-tailed)	.260	.332		.000	.000
	N	26	26	26	26	26
OB	Pearson Correlation	.453*	.405*	.664**	1	.767**
	Sig. (2-tailed)	.020	.040	.000		.000
	N	26	26	26	26	26
ZA	Pearson Correlation	.285	.106	.778**	.767**	1
	Sig. (2-tailed)	.158	.606	.000	.000	
	N	26	26	26	26	26

\*. Correlation is significant at the 0.05 level (2-tailed).

\*\*. Correlation is significant at the 0.01 level (2-tailed).

Source: Author

Through the analysis of data in Table 7, upon obtaining the factor correlation, it is concluded that the shown factor values are correlated, which enables the creation of certain suggestions influencing the improvement of the existing values. These suggestions can address the elimination of specific threats existing in a certain percentage within these protected areas. Also, suggestions can refer to the intensification of nature-based tourism, ecotourism development, the improvement of the existing infrastructure within the protected areas, etc. These can represent a significant part of the sectoral tourism development strategy (Ceasu, Gomes, & Pereira, 2015; Doran, Hanss, & Larsen, 2017).

The main research problem in this paper was that protected natural resources overlap territorially with many ethno villages. The tourism development strategy of the numerous villages has rural tourism development as the main plan. Nature protection and protected areas in common zones are complementary tourism motives. Visiting the protected area is the second tourism motive, realized after a visit to the ethno villages or other tourism events.

## CONCLUSION

Indicators of sustainable tourism within five selected protected areas of the Autonomous Province of Vojvodina have been analyzed in the paper. These areas are specific spaces and attractive tourist destinations, in which many activities are limited since they can change the area and influence the natural resources and complete wildlife. The concept of



such area protection provides the use of resources, but only in a sustainable and renewable way (Whittle, Stewart, & Fisher, 2015; Font & McCabe, 2017). It additionally increases the tourist value of these destinations. From the respondents' point of view, the indicators of sustainable tourism, with the highest average values marked are as follows: the significance of protection for species sustainability, the existence of hydrographic potential, the possibility of science tourism development, animals and bird watching, the existence of endangered wildlife, as well as indicators referring to the infrastructure within the area. Since the respondents gave answers with significant statistical differences, it is concluded that not all indicators are equally represented within these areas. It enables the constitution of certain proposals aimed at the improvement of these values. A conclusion that the assessed indicators within the selected protected areas are correlated can be used in support of that. Bearing in mind that the responses gave importance to tourism development, forms of tourism which can have a positive influence on these protected areas are as follows: nature-based tourism, ecotourism, bird watching, science tourism etc. The Constitution of a proposal for tourism development is the main objective of this paper. All specified forms of tourism will give priority to the protection of area and species. As the final result of the influence of area protection on the quality and type of destination, the environmental, economic and socio-cultural benefits for all participants of this unique system are distinguished. This is, at the same time, the main objective of sustainable tourism development.

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## **ФУНКЦИЈА ЗАШТИЋЕНИХ ПРИРОДНИХ ПОДРУЧЈА ВОЈВОДИНЕ У ОДРЖИВОМ ТУРИСТИЧКОМ РАЗВОЈУ**

**Игор Тришић**

Универзитет у Крагујевцу, Факултет за хотелијерство и туризам,  
Врњачка Бања, Србија

### **Резиме**

Развој туризма у осетљивим дестинацијама, какви су заштићени природни простори, мора бити усклађен са природним, еколошким, социо-културним и економским принципима, по питању одрживог туристичког развоја. Уколико не постоји јасан концепт управљања и деловања на факторе одрживости, може доћи до негативних последица по све субјекте ових туристичких дестинација. Планирање је нарочито важно за заштићене просторе, како би се расположиви ресурси користили на одговарајући начин, а локална заједница била у потпуности укључена у системе заштите и управљања. На тај начин обезбеђује се адекватан доживљај туриста, што утиче на њихово задовољство и искуство у заштићеном простору. Имајући у виду повољан географски и туристички положај одабраних заштићених природних простора АП Војводине, у оквиру Србије и према државама у окружењу, то представља значајан потенцијал за туристичку тражњу за туристичким производом какав је туризам заснован на природи. Након спроведеног истраживања међу 250 домаћих и страних туриста, те анализе одговора који су се тicali нивоа и степена развоја туризма, као и значаја заштите простора, дошло се до значајних закључака. Према одговорима испитаника, заштићени природни простори АП Војводине могу представљати важну регионалну и међународну туристичку дестинацију одрживог туризма или других облика утемељених на природи. Разлог за то је што ови простори поседују значајне факторе одрживости, које су туристи препознали приликом посета. Као највише оцењени јесу фактори локација, поседовање угрожених биљних и животињских врста, унапређење заштите, могућност развоја различитих облика туризма утемељених на природи, присуство влажних станишта и ретких екосистема и други. Наведени фактори чине ове просторе јединственом туристичком дестинацијом и могу бити предмет интересовања различитих група туриста. Након анализе добијених резултата истраживања, дошло се до закључка да заштићени природни простори АП Војводине могу представљати врло привлачне дестинације, у којима се могу остварити значајни социо-културни, еколошки и економски резултати одрживог туристичког развоја.

## SATISFACTION AND LOYALTY AS INDICATORS OF THE QUALITY OF TOURISM PRODUCT ELEMENTS

Ivana Kostadinović<sup>1</sup>, Sunčica Stanković<sup>2\*</sup>

<sup>1</sup>University of Niš, Faculty of Economics, Niš, Serbia

<sup>2</sup>Center for strategic researching and national security – CESNA B,  
Belgrade, Serbia

### Abstract

The continuous expansion and diversification of tourism in recent decades have led to this branch of industry to become one of the largest and fastest growing in the world. Well-planned tourism generates benefits to destinations by increased revenue from tourism and employment. In this connection, the quality of tourism services, and this is the tourists' satisfaction with the quality of tourism services provided, as a precursor of loyalty, become crucial for the successful development of tourism. The subject of this research are satisfaction and loyalty as indicators of tourism product element quality. The aim of this study is to explore the connection between tourists' satisfaction with the quality of catering services, accommodation services, transportation services and in terms of the specific tourism event with their age structure and region they visited, as well as the connection between satisfaction of tourists with the quality of the elements of the tourist product and loyalty. In order to achieve this objective, the sample included 381 respondents. Answers that are relevant for the analysis yielded 357 respondents. For statistical analysis, multivariate analysis of variance and discriminant analysis were used. Research results indicated that there were significant statistical differences between the age structure and tourists' satisfaction, that these also corresponded to the region visited, and tourist loyalty depends on their satisfaction with the quality of elements of the tourist product.

**Key words:** tourism, tourism product, quality of tourism service, tourist satisfaction, tourist loyalty.

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\* Аутор за кореспонденцију: Сунчица Станковић, Центар за стратешка истраживања националне безбедности – ЦЕСНА Б, Војводе Влаховића 35ђ/1.2, 11000 Београд, Србија, [suncicas@gmail.com](mailto:suncicas@gmail.com)

## ЗАДОВОЉСТВО И ЛОЈАЛНОСТ КАО ПОКАЗАТЕЉИ КВАЛИТЕТА ЕЛЕМЕНАТА ТУРИСТИЧКОГ ПРОИЗВОДА

### Апстракт

Континуирана експанзија и диверзификација туризма последњих деценија довели су до тога да ова привредна грана постане једна од највећих и најбрже растућих у свету. Добро испланирани туризам користи дестинацијама повећањем прихода од туризма и запослености. С тим у вези, квалитет туристичких услуга, а самим тим и задовољство туриста квалитетом пружених туристичких услуга, као претходница лојалности – постају од кључног значаја за успешан развој туризма. Предмет овог истраживања су задовољство и лојалност као показатељи квалитета елемената туристичког производа. Циљ рада јесте испитивање повезаности задовољства туриста квалитетом угоститељских услуга, услуга смештаја, услуга превоза и пружања специфичног туристичког догађаја са њиховом старосном структуром и регионом који су посетили, као и повезаност између задовољства туриста квалитетом елемената туристичког производа и лојалности. Ради остварења овог циља, спроведено је истраживање које је обухватило 381 испитаника. Одговоре који су релевантни за анализу дало је 357 испитаника. За обраду података коришћене су мултиваријациона анализа варијансе и дискриминациона анализа. Резултати истраживања указују на то да постоје значајне статистичке разлике између задовољства и старосне структуре туриста, према региону који су посетили, као и да лојалност туриста зависи од њиховог задовољства квалитетом елемената туристичког производа.

**Кључне речи:** туризам, туристички производ, квалитет туристичке услуге, задовољство туриста, лојалност туриста.

### INTRODUCTION

In modern conditions of the continual expansion and diversification of the tourism industry, but also the increased competitiveness within the global tourist market, the development of the quality of the tourist product, defined as "satisfactory activity within the desired destination" (Jefferson, & Lickorish, 1988), is becoming increasingly important (Tîţu et al., 2016). Numerous studies show that the perceived value, identified within the marketing literature in content of the foremost important measures for gaining a competitive advantage, a vital predictor and key determinant of customer satisfaction and loyalty (Petrick & Bakman, 2002; Parasuraman & Grewal, 2000; McDougall & Levesque, 2000). However, within the field of tourism, the intention to revisit a destination and the loyalty of tourists is commonly determined solely by measuring satisfaction and/or quality of services (Petrick & Bakman, 2002).

Parasuraman et al. (2005) define service quality as the degree and direction of the difference between consumer perceptions and expectations, while perceived quality, i.e. the difference between consumer expectations and perceptions, is defined as a measure of service quality.

Thus, service quality could be a construct that measures the difference between a consumer's expectations and perceptions (Hassan et al., 2013). Literature related to the quality of services within the field of tourism and recreation, dates from the early sixties of the last century (Baker & Crompton, 2000). Frochot (2004) believes that the character of tourism services, which is predicated on both the sale of consumer services and therefore the provision of services through which consumers can meet deep-rooted needs, makes their assessment reasonably complex. As the quality in general, and, also, the quality of services in tourism specifically, along with the satisfaction of tourists are complex multidimensional and dynamic concepts that are, further, jointly determined by individual characteristics and values of customers, situational and market forces (Zeithaml, 2000), deciding the determinants of consumer satisfaction (e.g. tourists) becomes an extremely difficult theoretical and empirical task (Fuchs, & Weiermair, 2003).

Defining consumer satisfaction varies greatly looking at the context (Sánchez-Rebull, Rudchenko, & Martin, 2018). Satisfaction is defined as a mismatch between the perception of expectations before and also the perception of performance after consuming goods/services - if performance differs from expectations, dissatisfaction occurs (Chen & Chen, 2010; Oliver, 1980). When it involves tourism, tourist satisfaction is primarily seen as a function of expectations before and the actual travel experience (Chen & Chen, 2010). Tourists, like other consumers, generally have initial expectations about the sort and quality of services that certain destinations offer (Akama & Kieti, 2003). The extent of tourist satisfaction is set by the extent to which their expectations are met. If the general performance, during or after the tour of the tourist destination, exceeds or meets the initial expectations, then the tourist is satisfied. However, in situations when the perception of tourists about the performance is below initial expectations, then the tourist could also be dissatisfied. So, when the experience in regard to expectations ends up in a sense of satisfaction (or dissatisfaction), the tourist is satisfied (or dissatisfied) (Chen & Chen, 2010; Reisinger & Turner, 2003). In this regard, tourist satisfaction is one of the most important sources of competitive advantage of the destination because the most significant goal of tourism actors is to assess both the adequacy and effectiveness of tourism products in terms of facilities and services that together result in an unforgettable experience for tourists (Bagri, & Kala, 2015b). Satisfaction affects the choice of tourist destination, as well as the decision of tourists to return to it (Bagri, & Kala, 2015a; Armario, 2008; Kozak & Rimington, 2000). For this reason, satisfaction is considered a central concept in tourism (Prayag, 2009; Chen & Tsai, 2007), and a key indicator of the performance of the tourism industry (Prebežac & Mikulić, 2008). Although earlier literature encompasses several different meanings of satisfaction, the most common forms are transient and cumulative satisfaction (Eid et al., 2019; Nam et al., 2011; Ekinici et al., 2008;

Yoon & Uysal, 2005). Transient satisfaction involves behavior and actions that occur when there is an interaction with the services (Eid et al., 2019; Oliver, 1997), while cumulative satisfaction is considered to be the type of recent experience process that is consistent with all encounters with the same service provider (Eid et al., 2019; Nam et al., 2011; Ekinci et al., 2008).

Loyalty is an integral part of business, however, relatively little is known about consumer loyalty. Riley et al. (2001) imply that loyalty is commonly seen as an attraction that is difficult to define considering the variety of roles that both previous attitudes and values and repeated behavior play. The efforts of experts to exactly define a loyal consumer have resulted in little progress in determining the factors that result in loyalty. So, although loyalty is taken into account as the “backbone of business,” this construct has remained a mystery (Gremler & Brown, 1996). One of the attempts to define a loyal consumer is that it is someone who is curious about repurchasing from the identical supplier of products/services or spreading the word of mouth (Liu et al., 2013). Loyalty may be a consequence of satisfaction of service users (Vogt, 2011) and it is unthinkable for a tourist to go to a destination again if they are dissatisfied (Oppermann, 2000). Measuring the satisfaction of service users, ie consumers, shows how much their expectations are met by a given transaction. Measuring consumer loyalty shows how much the user of products/services is willing to repeat the purchase or give a positive recommendation (Sagib & Zapan, 2014). Gremler & Brown (1999) divided loyalty into three different categories: 1) behavioral loyalty (behavior that ends up in repeat purchases); 2) intentional loyalty (possible intention to shop for again) and emotional loyalty (when the consumer considers that the merchandise/service completely coincides along with his values, ideas and preferences). In conditions of growing competition, tourist loyalty is taken into account as a vital means of maintaining the benefits of a tourist destination. Loyal tourists contribute to the loyalty of the destination, but also to the tourist loyalty to the whole area (Xu & Wang, 2016).

Numerous researchers have researched the connection between quality, satisfaction and loyalty, with the results of many studies showing that there is a positive relationship between these constructs in tourism: tourist satisfaction influences their intention to recommend a destination (Abdalla et al., 2014); the low level of tourist satisfaction significantly reduces their intention to go to the destination again (Assaker et al., 2011); the level of satisfaction features a great influence on the intentions of tourists (Dayour & Adongo, 2015). However, these relations are not always positive, because there are tourists who reconsider the same destination, but there are also those who want to go to new ones, despite the very fact that they are satisfied (Fyall et al., 2003). Thus, as a result of the action of many factors, the connection between satisfaction and loyalty is quite complex and is not always proportional (Lepojević, & Đukić, 2018). The results of a study conducted by Faullant et al. (2008) show that the connection between



satisfaction and loyalty does not seem linear, and that the causal link between these two constructions is not always clear. Based on the results of research on the quality of cruising tourism, conducted by Radić & Popesku (2018), satisfaction is positively related to the future behavior of the guest. The results of the research conducted by Lukić et al. (2020), on visitors from Serbia and abroad, show a higher degree of satisfaction with the atmosphere, safety during the stay within the destination and the relationship between visitors and the local community, in relation to tourist activities in the region, tourism product quality and social impact.

### RESEARCH METHODOLOGY

The subject of this research is satisfaction and loyalty as indicators of the tourism product elements quality. The aim of the research is to examine the connection between tourist satisfaction with the quality of tourism product elements (catering services, accommodation services, transport services and providing specific tourist event) with their age structure, and the region they visited, as well as the connection between tourist satisfaction with tourism service elements quality and loyalty. The target population consisted of tourists who visited Belgrade and the region of Southern and Eastern Serbia, regardless of marital status, length of stay and origin. The sampling method is convenient sampling, which is based on the selection of available population members (Fajgelj, 2005), and which, according to Mumuni and Mansour (2014), is widely used in research dealing with tourism. The conducted research included 381 respondents. Answers relevant to the analysis were given by 357 respondents, 175 (49.0%) of which are visitors to the Belgrade region, while 182 (51%) respondents are visitors to the region of Southern and Eastern Serbia. Most of respondents were men (55.2%), and most of respondents were within the age group "up to 24". According to the level of education, most respondents have completed secondary education (56.6%) (Table 1).

*Table 1. Demographic structure of respondents (n = 357)*

Total		n	%
Gender	Men	197	55.2
	Women	160	44.8
Region	Belgrade	175	49.0
	Southern and Eastern Serbia	182	51.0
Age	Up to 24	149	41.7
	25–39	72	20.2
	40–54	63	17.6
	55+	73	20.4
Education	Lower education	0	0.0
	Secondary education	202	56.6
	Higher education	155	43.4

*Source: Author's calculation*

Face-to-face techniques, a paper questionnaire and an electronic questionnaire were used to collect the data. The research, including the pilot test, was conducted in the period of February - April, 2019. The questionnaire is composed of three parts, with the questions in the first part related to the demographic characteristics of respondents. The second part contains questions related to respondents' satisfaction with the quality of the provided tourist services, while the third part refers to the respondents' intention to re-visit or recommend a destination they have visited. The list of elements of the tourist product was compiled from a review of the relevant literature (Bakić, 2002; Johann & Anastassova, 2014; Koutoulas, 2015). Respondents expressed the degree of their satisfaction on a 7 point Likert scale (1 – least; 7 – most).

In accordance with the subject and goal of the research, the following hypotheses were tested:

H<sub>1</sub>: There is a significant statistical difference between the tourists' satisfaction with the quality of catering services, accommodation services, transport services, and the specific provided tourism event and tourist age structure, with respect to the region that have visited.

H<sub>2</sub>: Tourists' satisfaction with the quality of catering services, accommodation services, transport services and the specific provided tourism event impacts their loyalty.

Testing hypothesis H<sub>1</sub> was conducted using multivariate analysis of variance (MANOVA) to explore the differences between age structure and region in relation to tourist satisfaction with the quality of: catering services, accommodation services, transportation services and the specific provided tourism event. To test hypothesis H<sub>2</sub>, a discriminant analysis was applied, which classified the respondents into two groups "loyal" and "disloyal". The SPSS IBM Statistics Version 17 statistical package was used for data processing.

## *RESULTS AND DISCUSSION OF ACHIEVED RESULTS*

### *Testing the Hypothesis H<sub>1</sub>*

Factor multivariate analysis of variance was used to test hypothesis H<sub>1</sub>, in order to investigate the differences between the age structure and the region in relation to tourist satisfaction. Satisfaction of tourists is expressed through four dependent variables: satisfaction with the catering services quality, satisfaction with the accommodation services quality, satisfaction with the quality of transport services (transfer to and within the destination) and satisfaction with the provided specific tourism event (entertainment, attractions, knowledge). The independent variables were the age structure of the tourists (up to 24, 25–39, 40–54, and 55 +) and the type of region (Belgrade and the region of Southern and Eastern Serbia) they visited. The

assumption of homogeneity of the matrices of variance and covariance was not violated because the value of Sig. Boxing index = 0.002 > 0.001.

Descriptive measures (Table 2) indicate that, according to the age structure and region, the highest average value can be attributed to the visitors to the Belgrade region in the group "25 - 39", with the variable "satisfaction with the quality of the specific provided tourist event", while the largest standard deviation from the average value can be attributed to the visitors from the region of Southern and Eastern Serbia in the group "55 +" for the variable "satisfaction with the quality of the accommodation services."

*Table 2. Descriptive statistics*

	Age of tourists	Region	Mean	Std. Deviation	N
Satisfaction with the quality of the catering services	Up to 24	Belgrade	4.67	.750	89
		Southern and Eastern Serbia	4.30	.619	60
	25-39	Belgrade	4.73	.837	41
		Southern and Eastern Serbia	4.19	.654	31
	40-54	Belgrade	4.12	.711	26
		Southern and Eastern Serbia	4.62	.639	37
	55 +	Belgrade	3.74	.653	19
		Southern and Eastern Serbia	4.39	.899	54
Satisfaction with the quality of the accommodation services	Up to 24	Belgrade	4.64	.757	89
		Southern and Eastern Serbia	4.17	.886	60
	25-39	Belgrade	4.29	.873	41
		Southern and Eastern Serbia	4.35	.661	31
	40-54	Belgrade	3.58	.703	26
		Southern and Eastern Serbia	3.92	.983	37
	55 +	Belgrade	3.53	.841	19
		Southern and Eastern Serbia	3.63	.996	54
Satisfaction with the quality of the transport services	Up to 24	Belgrade	4.48	.693	89
		Southern and Eastern Serbia	3.88	.691	60
	25-39	Belgrade	4.44	.673	41
		Southern and Eastern Serbia	4.10	.597	31
	40-54	Belgrade	3.92	.744	26
		Southern and Eastern Serbia	4.03	.799	37
	55 +	Belgrade	4.05	.621	19
		Southern and Eastern Serbia	4.37	.760	54
Satisfaction with the quality of the provided specific tourist event	Up to 24	Belgrade	4.80	.786	89
		Southern and Eastern Serbia	3.88	.715	60
	25-39	Belgrade	5.00	.671	41
		Southern and Eastern Serbia	3.65	.486	31
	40-54	Belgrade	4.38	.637	26
		Southern and Eastern Serbia	4.49	.692	37
	55 +	Belgrade	4.00	.745	19
		Southern and Eastern Serbia	4.15	.737	54

*Source: Author's calculation in SPSS*

Table 3 shows the multivariate tests. Statistical significance for all independent variables is  $p = 0.000 < 0.05$  in relation to tourist satisfaction, so that the null hypothesis of no differences between satisfaction and age of tourists, considering the region they visited, is rejected.

The preliminary examination examined the assumptions about normality, linearity, univariate and multivariate atypical points, homogeneity of matrices of variance-covariance and multicollinearity, with no serious violation of the assumptions (Green & Salking, 2014; Pallant, 2007). There were significant statistical differences between the age structure of tourists and the type of region they visited in relation to the combination of dependent variables. There was a statistically significant difference in tourist satisfaction according to: age structure,  $F(12, 915) = 6.236$ ,  $p = 0.0001 < 0.05$ ; Wilks' Lambda = 0.812; partial eta squared = 0.067 (medium impact) (Cohen, 1988, 284–287); the region they visited,  $F(4, 364) = 14.617$ ,  $p = 0.0001 < 0.05$ ; Wilks' Lambda = 0.855; partial eta squared = 0.145 (large impact); age structure and the region visited,  $F(12, 915) = 6.206$ ,  $p = 0.0001 < 0.05$ ; Wilks' Lambda = 0.813; partial eta squared = 0.067 (medium impact).

Table 3. Multivariate tests

Effect		Value	F	Hypothesis df	Error df	Sig.	Partial Eta Squared
Age of tourists	Pillai's Trace	.196	6.094	12.000	1044.000	.0001	.065
	Wilks' Lambda	.812	6.263	12.000	915.000	.0001	.067
	Hotelling's Trace	.222	6.381	12.000	1034.000	.0001	.069
	Roy's Largest Root	.161	14.050	4.000	348.000	.0001	.139
Region	Pillai's Trace	.145	14.617	4.000	346.000	.0001	.145
	Wilks' Lambda	.855	14.617	4.000	346.000	.0001	.145
	Hotelling's Trace	.169	14.617	4.000	346.000	.0001	.145
	Roy's Largest Root	.169	14.617	4.000	346.000	.0001	.145
Age of tourists	Pillai's Trace	.193	5.994	12.000	1044.000	.0001	.064
	Wilks' Lambda	.813	6.206	12.000	915.000	.0001	.067
*	Hotelling's Trace	.222	6.372	12.000	1034.000	.0001	.069
Region	Roy's Largest Root	.179	15.555	4.000	348.000	.0001	.152

Source: Author's calculation in SPSS

By separately considering the results of the dependent variables (Table 4), after Bonferroni correction alpha level is 0.013, the differences between the age structure and the satisfaction of tourists with the quality of the catering services,  $F(3, 349) = 4.733$ ,  $p = 0.003$ ; partial eta squared = 0.039, and accommodation services  $F(3, 349) = 18.137$ ,  $p = 0.0001$ ; partial eta squared = 0.135. Statistical significance of differences was achieved between the regions visited by tourists and their satisfaction with the quality of the provided specific tourist event  $F(1, 349) = 36.584$ ,  $p = 0.0001$ ; partial eta squared = 0.095. Statistical significance of differences was achieved between the age structure of tourists, according to the region they visited and

satisfaction with the quality of the catering services,  $F(3, 349) = 11,932$ ,  $p = 0.0001$ ; partial eta squared = 0.093; accommodation service  $F(3, 349) = 4.152$ ,  $p = 0.007$ ; partial eta squared = 0.034; transport services,  $F(3, 349) = 7.353$ ,  $p = 0.0001$ ; partial eta squared = 0.059, and the specific provided tourist event  $F(3, 349) = 19.088$ ,  $p = 0.0001$ ; partial eta squared = 0.141.

*Table 4. Tests of between-subjects effects*

Source	Dependent variable	df	Mean Square	F	Sig.	Partial Eta Squared
Age of tourists	Satisfaction with the quality of the catering services	3	2.589	4.733	.003	.039
	Satisfaction with the quality of the accommodation services	3	13.140	18.137	.0001	.135
	Satisfaction with the quality of the transport services	3	1.039	2.090	.101	.018
	Satisfaction with the quality of the provided specific tourist event	3	1.412	2.803	.040	.024
Region	Satisfaction with the quality of the catering services	1	.274	.500	.480	.001
	Satisfaction with the quality of the accommodation services	1	.005	.007	.933	.0001
	Satisfaction with the quality of the transport services	1	1.224	2.462	.118	.007
	Satisfaction with the quality of the provided specific tourist event	1	18.434	36.584	.0001	.095
Age of tourists * Region	Satisfaction with the quality of the catering services	3	6.527	11.932	.0001	.093
	Satisfaction with the quality of the accommodation services	3	3.008	4.152	.007	.034
	Satisfaction with the quality of the transport services	3	3.657	7.353	.0001	.059
	Satisfaction with the quality of the provided specific tourist event	3	9.618	19.088	.0001	.141

*Source: Author's calculation in SPSS*

Therefore, it can be concluded that hypothesis  $H_1$  is accepted, i.e. that there is a significant statistical difference between tourists' satisfaction with the quality of catering services, accommodation services, transport services, and the specific provided tourism event and tourist age structure, with respect to the region visited.

#### *Testing the Hypothesis $H_2$*

Discriminant analysis was used to classify respondents into "loyal" and "disloyal" groups. The value of Sig. Box-Cox index  $M = 0.003 > 0.001$ , so that the assumption of homogeneity of the covariance matrices is not violated.

Table 5 shows group statistics. Based on the results, it can be seen that the average values of the groups and “loyal” and “disloyal” are the highest for the variable “satisfaction with the quality of the catering services”, while the largest standard deviation from the average value in the group “disloyal” for the variable “satisfaction with the quality of the accommodation services.”

*Table 5. Group statistics*

Loyalty		Mean	Std. Deviation	Valid N (listwise)	
				Unweighted	Weighted
Loyal	Satisfaction with the quality of the catering services	4.54	.747	299	299.000
	Satisfaction with the quality of the accommodation services	4.21	.911	299	299.000
	Satisfaction with the quality of the transport services	4.32	.674	299	299.000
	Satisfaction with the quality of the provided specific tourist event	4.51	.761	299	299.000
Disloyal	Satisfaction with the quality of the catering services	3.91	.732	58	58.000
	Satisfaction with the quality of the accommodation services	3.74	.947	58	58.000
	Satisfaction with the quality of the transport services	3.67	.825	58	58.000
	Satisfaction with the quality of the provided specific tourist event	3.62	.768	58	58.000

*Source: Author's calculation in SPSS*

The total indicator of Wilk's Lambda shows that the discriminant function, determined by the  $\chi^2$  test, is statistically significant,  $\chi^2$  (df = 4) = 72.394,  $p < 0.001$ , the value of Sig. = 0.000, shows that the null hypothesis is rejected and that the application of discriminant analysis makes sense. The eigenvalue shows a canonical correlation of 0.431. By squaring the canonical correlation, a value of 0.1858 was obtained, i.e. 18.58% of the variance of the dependent variable (loyal and disloyal) was explained on the basis of four independent variables (satisfaction with the quality of the catering services, satisfaction with the quality of the accommodation services, satisfaction with the quality of the transport services, and satisfaction with the quality of the specific provided tourist event). The variable “satisfaction with the quality of the provided specific tourist event” has the strongest (discriminatory load = 0.903), and the variable “satisfaction with the accommodation services quality” the weakest impact (discriminatory load = 0.394) on the separation of respondents into two groups. By separately considering the results of independent variables using Wilk's Lambda indicator and univariate indicator F, it was concluded that all independent variables reach statistical significance for classifying respondents into two groups: satisfaction with the

quality of the catering services  $F(1, 355) = 34.179, p = 0.0001 < 0,05$ ; satisfaction with the quality of the accommodation services  $F(1, 355) = 12.554, p = 0.0001 < 0,05$ ; satisfaction with the quality of the transport services  $F(1, 355) = 41.72, p = 0.0001 < 0.05$ ; satisfaction with the quality of the provided specific tourist event  $F(1, 355) = 65.840, p = 0.0001 < 0.05$  (Table 6).

*Table 6. Diagnostic of discriminant analysis*

Predictor variables	Discriminatory load	Mean group value		Wilk's Lambda	F	Sig.
		Loyal	Disloyal			
Satisfaction with the quality of the catering services	.650	4.54	3.91	.912	34.179	.0001
Satisfaction with the quality of the accommodation services	.394	4.21	3.74	.966	12.554	.0001
Satisfaction with the quality of the transport services	.718	4.32	3.67	.895	41.712	.0001
Satisfaction with the quality of the provided specific tourist event	.903	4.51	3.62	.844	65.840	.0001
Total indicator of Wilk's Lambda				.815	Chi-square: 72.394	.0001
Eigenvalue				.228		
Canonical Correlation				.431		

*Source: Author's calculation in SPSS*

The results of the classification (Table 7) show that 73.1% of cases are correctly classified. The classification of results shows that 72.9% were correctly classified for the group "loyal", and 74.1% were correctly classified for the group "disloyal". Based on the value of the indicator Q ( $Q = 76.20 > 6.63$ ), the accuracy of the prediction is higher than the classification accuracy based on randomness at a statistically significant level ( $p < 0.01$ ).

*Table 7. Classification results*

	Loyalty	Predicted group affiliation		Total	
		Loyal	Disloyal		
Original data	Number	Loyal	218	81	299
	of cases	Disloyal	15	43	58
	%	Loyal	72.9	27.1	100.0
		Disloyal	25.9	74.1	100.0

a. 73.1% of original grouped cases correctly classified.

*Source: Author's calculation in SPSS*

Having in mind the above, it can be concluded that hypothesis H<sub>2</sub> is accepted, i.e. that tourists' satisfaction with the quality of catering services, accommodation services, transport services and the specific provided tourism event impacts their loyalty.

### CONCLUSION

This research is focused on examining the relationship between tourist satisfaction with the tourism product elements quality and the age structure of respondents according to the region they visited, as well as examining the relationship between tourist satisfaction with tourism product elements quality and tourist loyalty. Understanding the tourism product is a prerequisite for efficient destination marketing, but also for the phenomenon of tourism in general.

The results of the research showed that satisfaction with the quality of tourist services largely depends on the age structure and region visited by tourists, with the greatest statistical significance of the difference observed between satisfaction and region. By separately considering the results of the dependent variables, the differences between the age structure and the tourists' satisfaction with the accommodation services quality reached the greatest statistical significance. The age structure of tourists, according to the type of region they visited, has the greatest impact on satisfaction with the specific provided tourist event quality, and the smallest on satisfaction with the accommodation services quality.

Also, the obtained results showed that the satisfaction of tourists with the quality of the elements of tourist services has impact on their loyalty. By dividing the respondents into two groups (loyal and disloyal), it was determined that "satisfaction with the quality of the provided tourist event" has the strongest influence on the separation between the groups.

The limitations of the conducted research are, first of all, reflected in the limitedness of the sample only for visitors to Belgrade and the region of Southern and Eastern Serbia, while there is no data on other regions in Serbia the tourists visited. In addition, since this is a convenient sample, the generalization of the results is very limited. Also, one of the limitations of the research is that it is an *ad hoc* research, i.e. the research that was conducted in one period of time, so that the degree of connection between the quality of the elements of the tourist product, satisfaction and loyalty cannot be accepted with certainty.

This research included respondents who visited Belgrade and the region of Southern and Eastern Serbia. In that sense, future research could be extended to visitors from other regions in Serbia. In addition, future research may address the relationship between tourist satisfaction with the quality of elements of a tourist product with their origin and length of stay



in a particular region or destination. Having in mind the importance of the quality of the elements of the tourist product, as well as the satisfaction of tourists, on the formation of the base of loyal tourists, in order to better understand the relationship between the quality of the elements of the tourist product and satisfaction and loyalty of tourists, further research is needed which should be conducted on a more representative sample.

In practical terms, the results of this research indicate that improving the quality of the elements of the tourist product (service), leads to a higher level of satisfaction, and thus to the loyalty of tourists, which, as a final result, increases the base of loyal tourists. Considering that tourism has become one of the largest and fastest growing industries in the world that generates benefits for destinations, the quality of tourist services, and thus the satisfaction of tourists with the quality of tourist services, as a precursor to loyalty, become crucial for successful tourism development. In this regard, the need to increase research on improving the quality of the elements of the tourist product, as well as on the satisfaction and loyalty of tourists, is one of the key implications of this research.

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## **ЗАДОВОЉСТВО И ЛОЈАЛНОСТ КАО ПОКАЗАТЕЉИ КВАЛИТЕТА ЕЛЕМЕНАТА ТУРИСТИЧКОГ ПРОИЗВОДА**

**Ивана Костадиновић<sup>1</sup>, Сунчица Станковић<sup>2</sup>**

<sup>1</sup>Универзитет у Нишу, Економски факултет, Ниш, Република Србија

<sup>2</sup>Центар за стратешка истраживања националне безбедности – ЦЕСНА Б,  
Београд, Србија

### **Резиме**

У савременим условима континуиране експанзије и диверзификације туристичке индустрије, као и повећане конкуренције на глобалном туристичком тржишту, развијање квалитета туристичког производа постаје све значајније. С тим у вези, квалитет туристичких услуга, а самим тим и задовољство туриста квалитетом пружених туристичких услуга, као претходница лојалности – постају од кључног значаја за успешан развој туризма.

Предмет овог истраживања су задовољство и лојалност као показатељи квалитета елемената туристичког производа. Циљ рада је испитивање повезаности сатисфакције туриста квалитетом угоститељских услуга, услуга смештаја, услуга превоза и пружања специфичног туристичког догађаја са њиховом старосном структуром и регионом који су посетили, као и повезаност између задовољства туриста квалитетом елемената туристичког производа и лојалности.

У складу са предметом и циљем истраживања, постављене су следеће хипотезе: Х1: Постоје значајне статистичке разлике између задовољства туриста квалитетом угоститељских услуга, услуга смештаја, услуга превоза и пружених специфичних туристичких догађаја и старосне структуре туриста, с обзиром на регион који су посетили. Х2: Задовољство туриста квалитетом угоститељских услуга, услуга смешта-

ја, услуга превоза и пруженог специфичног туристичког догађаја утиче на њихову лојалност.

Тестирање хипотезе Х1 спроведено је применом мултиваријационе анализе варијансе (МАНОВА) како би се истражиле разлике између старосне структуре и региона у односу на задовољство туриста квалитетом угоститељских услуга, услуга смештаја, услуга превоза и пружањем специфичног туристичког догађаја. За тестирање хипотезе Х2 примењена је дискриминациона анализа, којом су испитаници класификовани у две групе: „лојални” и „нелојални”.

Резултати истраживања указују на то да постоје значајне статистичке разлике између задовољства и старосне структуре туриста, према региону који су посетили, као и да лојалност туриста зависи од њиховог задовољства квалитетом елемената туристичког производа.

У практичном смислу резултати ове студије упућују на то да унапређење квалитета елемената туристичког производа (услуге) доводи до већег нивоа задовољства, а самим тим и до лојалности туриста. Што се недостатака овог истраживања тиче, они се, пре свега, огледају у ограничениости узорка само на посетиоце Београдског региона, те региона Јужне Србије и Источне Србије.



## AGRICULTURAL INTRA-INDUSTRY TRADE IN SERBIA

Dorđe Ćuzović<sup>1\*</sup>, Svetlana Sokolov-Mladenović<sup>2</sup>

<sup>1</sup>Novi Sad School of Business, Novi Sad, Serbia

<sup>2</sup>University of Niš, Faculty of Economics, Niš, Serbia

### Abstract

Intra-industrial trade is the exchange of products between countries in the same sector of the economy. A significant part of export and import in goods takes place within the same sector of the economy. This paper analyzes the intra-industrial trade in agricultural products of Serbia and its foreign trade partners from 2004 to 2018. The Grubel-Lloyd intra-industrial trade index was used as a measure. The value of GLI in agricultural products increased over the observed period, ranging from 0.485 to 0.590 as in 2018, while the number of IIT-dominated groups ranged from 26 to 35. The results obtained indicate that vertical IIT is more prevalent than horizontal IIT and that the export of products with lower prices dominates, i. e. those that are, according to the assumptions of the model, of lower quality than the imported products. Dynamic change analysis shows that certain changes in the IIT pattern occur over time, but that changes are gradual without sudden peaks in the IIT structure.

**Key words:** intra-industrial trade, Grubel-Lloyd index, agriculture, Serbia, international trade.

## ИНТРАИНДУСТРИЈСКА ТРГОВИНА ПОЉОПРИВРЕДНИМ ПРОИЗВОДИМА У СРБИЈИ

### Апстракт

Интраиндустријска трговина представља размену производа истог сектора привреде између земаља. Значајан део извоза и увоза производа одвија се унутар истог сектора привреде. У раду је анализирана интраиндустријска трговина пољопривредним и прехранбеним производима Србије и њених спољнотрговинских партнера у периоду од 2004. до 2018. године. За мерење је коришћен Грубел–Лојдов (Grubel-Lloyd) индекс интраиндустријске трговине (GLI). Вредност GLI пољопривредних и прехранбених производа расла је у посматраном периоду и кретала се од 0,485 до 0,590, колико је износила 2018. године, док се број група код којих је доминирала ИИТ кретао од 26 до 35. Добијени резулта-

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\* Аутор за кореспонденцију: Ђорђе Ћузовић, Висока пословна школа струковних студија, Владимира Перића Валтера 4, 21000 Нови Сад, Србија, [cuzovic@gmail.com](mailto:cuzovic@gmail.com)

ти указују на то да је вертикална ИИТ заступљенија од хоризонталне ИИТ и да доминира извоз производа који имају ниже цене, тј. који су према претпоставкама модела лошијег квалитета у односу на производе из увоза. Анализа динамичких промена показује да долази до одређених промена у обрасцу ИИТ током времена, али да се промене дешавају постепено, без наглих промена у структури ИИТ.

**Кључне речи:** интраиндустријска трговина, Грубел–Лојдов индекс, пољопривреда, Србија, међународна трговина.

### *INTRODUCTION*

During the 20<sup>th</sup> century, the pattern of trade changed significantly. Due to lower transportation costs, the liberalization of international trade and economic integrations, international trade flows were intensified. Along with the growth of product exchange in different sectors of the economy, there is also an increase in the exchange of products in the same sectors of the economy. The emergence of trade is related to the exchange of agricultural products (Ćuzović, 2009, p. 27). A number of theorists explain international trade using David Ricardo's logic and his theory of comparative advantages. According to this theory, countries should specialize in the production of goods where they have comparative advantages and then exchange these products on the international market. In literature, the Heckscher-Ohlin model emerged later, incorporating two factors of production, and it became the dominant model of inter-industrial trade. According to the Heckscher-Ohlin theory, in a trade exchange between two countries, the country with higher relative availability of capital will export capital-intensive products. However, after World War II, the pattern of trade changed, so that trade liberalization and integration of countries took place. Under such conditions, countries were increasing trade and beginning to simultaneously export and import the same products.

The first studies addressing intra-industrial trade (IIT) were conducted in the 1960s (Verdoorn, 1960; Balassa, 1966), and after that extensive literature analyzing the field was published. Much attention has been paid to the study of IIT, as it is in contrast to traditional theories of international trade. These authors have come to the revolutionary observation that there is a specialization within the industry as well as a two-way international trade in products within the industry (Lloyd & Lee, 2002, p. 1).

One of the most common definitions of intra-industrial trade is that it represents the simultaneous export and import of similar products or services by the same country. Qasmi & Fausti (1999, p. 256) emphasize that IIT is connected to monopolistic markets and that international competition compels companies in monopolistic markets to specialize and exploit economies of scale by narrowing their production lines. According to the same authors, information on trade patterns can assist agricultural producers in strategic planning. Intra-industrial trade implies an increase in cost-



effectiveness, while information on the existence of IITs affects the specialization, differentiation and specific promotion of products.

In their work, Kol & Tharakan (1989) reviewed previous research dealing with IIT and highlighted differences that occur between the authors due to empirical observation and expectations based on traditional trade theories. Their paper highlights two views that explain the differences between empirical data and theoretical assumptions. According to the first view, IIT is a consequence of the inclusion of different products in the same statistical category. This phenomenon is called "categorical aggregation" and according to this view the difference of factor content (factor intensity) of these products is large enough to explain the validity of the Heckscher-Ohlin theory. The second approach in explaining the IIT phenomenon starts with the removal (mitigation) of assumptions on which the Heckscher-Olin theory is based. The assumption of a constant-yield production process is replaced by a higher-yield production process, product differentiation is introduced, and perfectly competitive markets are replaced by imperfect ones. In this way, theoretical foundations and different models have been created to explain empirical data on IITs. According to this view, the inclusion of products of different factor-intensity in the same category in the classification (categorical aggregation) may be consistent with the presence of different types of IITs.

Grubel & Lloyd (1975), whose index is most commonly used to measure IIT, categorized the products for which IIT was recorded. The first group consists of homogeneous products where exchange occurs due to transport costs and seasonal differences in production. The second group consists of heterogeneous products which may be substitutes. This group may include products that use different inputs and possibly represent direct substitutes, such as similar products obtained naturally or artificially, or products using the same inputs but intended for different end users (metals for the automotive and construction industries) and also products made from similar materials and using similar production processes (cars, television sets, etc.). The third group consists of heterogeneous products linked to the production stages in the same sector. This method of trading is called vertical trading and is present in sectors operated by transnational companies.

In a study conducted by Frankel (1943), the author concludes that countries that are open to international trade, that is, have a higher share of exchange per capita, more often export and import the same products, i.e. have a higher proportion of IITs (as cited in Kol & Tharakan, 1989). He explained this phenomenon by the difference in product quality, which is the result of differences in workers' skills between countries.

In addition to industrial products, where IIT was first observed, IIT is becoming more common in agricultural products. According to the data of the Statistical Bureau of the Republic of Serbia, agriculture's share in GDP in 2018 was 7%, while agricultural exports accounted for 18.3% of

the value of total exports. The share of agricultural products import in the total import was 8.4% in the same year. In the period between 2004 and 2018, agricultural export averaged 21.7% of total export, while import averaged 7.9% of total import. The foreign trade balance in the exchange of the mentioned products was negative only in 2004, while the surplus has been recorded since 2005. Serbia's most important foreign trade partners in agricultural trade include the EU, CEFTA 2006 member states and the Russian Federation. Agricultural trade between Serbia and these three most important foreign trade partners accounted for 87.4% of total export and 74.7% of total agricultural import in 2018. The presented data indicate that Serbia exports and imports agricultural products, and this paper examined IIT for these products using the GL index of IIT.

A similar analysis was made by Hoang (2019), who analyzed the IIT in Vietnam agriculture between 1997 and 2014. The author points out that the pattern of IIT in agricultural products depends on local production and demand, and that the economies of developing and transition countries diversify trade activities and IIT due to the restructuring of the economy and the spread of globalization.

Horizontal and vertical IIT should be distinguished when analyzing IIT. Horizontal IIT is an exchange of similar products, of similar quality but with different characteristics. Vertical IIT is an exchange of similar products, but of different quality. It is often emphasized that vertical IIT is characteristic for the exchange between developed and developing countries, while horizontal one is characteristic for exchange between developed countries. Within the framework of economic integrations, a growth of vertical IIT occurs that includes similar products with different quality levels. These theoretical assumptions have been confirmed by available research. In a paper that analyzes the determinants of horizontal and vertical IIT in trade between countries of the Visegrad Group, Jámbor (2015) points out that agricultural products are dominated by vertical IIT, i.e. that products of different quality are being exchanged. In another paper, the same author states that after Hungary joined the EU their vertical IIT increased, that is, the exchange of products of different characteristics and prices (Jámbor, 2010). Similar results were obtained by Fertő (2015), who analyzed horizontal IIT in the EU from 1999 to 2010. His results show a low level of horizontal IIT for agricultural products in countries that joined the EU later.

Based on the aforementioned theoretical assumptions, this paper analyzes IIT of Serbia for agricultural products in the period between 2004 and 2018. Based on the movement of the GL index and the number of products characterized by horizontal and vertical IITs, the changes that occurred in the observed period are indicated. Also, the paper analyzes the dynamic application of GL indexes in a given period using OLS regression.

### MATERIALS AND METHODS

Intra-industrial trade is defined as the simultaneous export and import of products within the same industry sector. The extent of IIT can be measured by a Grubel-Lloyd index that relies on an index previously developed by Balassa (1966). The values of the Grubel-Lloyd Index (GLI) range from 0 to 1 and show the similarity of the exchange between the two countries (Grubel-Lloyd, 1975). The higher the index value, the higher is the IIT intensity. The index has a value of 0 when there are no products exported and imported within the same class ( $GLI = 0$ ;  $X_i = 0$  or  $M_i = 0$ ), while the index is equal to 1 when the value of the exported and imported products within the same class is equal ( $GLI = 1$ ;  $X_i = M_i$ ). The GLI calculation formula is:

$$GLI_{i,AB} = \frac{(X_i + M_i) - |X_i - M_i|}{(X_i + M_i)}$$

$X_i$  – the value of the exported product  $i$ ,

$M_i$  – the value of the imported product  $i$ .

According to Qasmi & Fausti (2001), GLI values can be classified into four groups (as cited in Hoang, 2019, p.76).

*Table 1. The classification of GLI values*

Class 1	$0.00 \leq GLI \leq 0.25$	Strong inter-industry trade
Class 2	$0.25 < GLI \leq 0.50$	Weak inter-industry trade
Class 3	$0.50 < GLI \leq 0.75$	Weak intra-industry trade
Class 4	$0.75 < GLI \leq 1$	Strong intra-industry trade

*Source: Qasmi & Fausti, 2001 (as cited in Hoang, 2019)*

In order to compare results between countries and sectors, GLI can be aggregated at country and sector levels. The bilateral IIT index is calculated as the weighted average of the index (1) for all product classes  $i$ , with the weights of total trade with the product  $i$  relative to the total trade of all products. Country and sector IIT index is calculated by the formula:

$$GLI_{i,AB} = \sum_i \left( \frac{(X_i + M_i) - |X_i - M_i|}{(X_i + M_i)} \right) * \left( \frac{(X_i + M_i)}{\sum_i (X_i + M_i)} \right)$$

Grubel & Lloyd (1971) state that IIT can be divided to horizontal and vertical one. Horizontal intra-industrial trade is defined as the simultaneous export and import of products classified in the same sector and at the same processing stage, while vertical IIT is defined as the simultaneous export and import of products classified in the same sector but at different stages of processing.

There are several options in the literature for separating horizontal and vertical IITs. Horizontal intra-industrial trade (HIIT) is defined as the

exchange of products that are differentiated by different attributes not including quality, while vertical intra-industrial trade (VIIT) is the exchange of products characterized by different quality (Ekanayake, Veeramacheneni, & Moslares, 2009, p. 30). The total IIT equals the sum of the horizontal and vertical IITs.

$$GLI_i = HIIT_i + VIIT_i$$

Greenaway, Hine, & Milner (1995) developed an approach of separating horizontal and vertical IITs using the relative units index (UV) of exports and imports. The Relative Units Index (UV) measures the average price of a product in a given group based on perfect information assumptions. According to Stiglitz (1987), even in cases of asymmetric information prices will be a reflection of quality. According to these assumptions, a product sold at a higher price is better than a product sold at a lower price. The formula used is as follows:

$$1 - \alpha \leq \frac{UV_j^X}{UV_j^M} \leq 1 + \alpha$$

In the above formula, UV denotes the value of the product unit, X is the export, M is the import of the product j, and  $\alpha = 0.15$ . According to Greenaway, Hine, & Milner (1995), a product is horizontally differentiated if the unit export value compared to the unit import value is within the range of 15%, otherwise it is a vertically differentiated product. Vertical IIT indicates significant differences in the quality of goods exported and imported. If the difference between unit values of exports and imports is lower than 0.85, then the quality of the exported product is worse than the quality of the imported product and this represents a low-quality vertical IIT. If the difference between unit values of exports and imports is greater than 1.15, then the quality of the product being exported is assumed to be better than the quality of the product being imported and this represents a high-quality vertical IIT.

The paper will apply OLS regression to look at the dynamic changes of GLI in the observed periods. This methodology has been applied in the works of Dalum, Laursen, & Villumsen (1998) and Hoang (2019). The regression model can be represented by the formula:

$$GLI_j^{t2} = \alpha + \beta GLI_j^{t1} + \varepsilon_j$$

In the above formula, t1 represents the initial year, t2 the last year in the observed period, j is the observed commodity group,  $\alpha$  is constant,  $\beta$  is regression coefficient and  $\varepsilon_j$  is residual and is assumed to be normally and identically distributed according to the model assumption. In this formula  $GLI_j^{t2}$  is the index value in the last year for commodity group j and represents the dependent variable, while  $GLI_j^{t1}$  is the index value in the initial year for commodity group j and represents the independent variable.

If the value of the regression coefficient  $\beta = 1$ , the IIT pattern did not change in the observed period. In the case where  $\beta > 1$ , the country with higher IIT value will increase the value of intra-industrial trade in products where it has already recorded a significant share of intra-industrial trade and increase the value of inter-industrial trade in products that have been characterized by inter-industrial trade. If  $0 < \beta < 1$ , it indicates that the existing pattern has changed, countries with high IIT value increase the value of inter-industrial trade and vice versa, and if  $\beta < 0$  the positions are reversed compared to the initial period.

Dalum, Laursen, & Villumsen (1998), as well as Hoang (2019) point out that regression analysis should show the extent of IIT changes over time and that  $\beta > 1$  does not represent a sufficient condition for IIT growth. The authors define the additional condition as:

$$\frac{\delta_{t2}}{\delta_{t1}} = \left| \frac{\beta}{R} \right|$$

In this formula  $\delta_{t1}$  is a standard deviation during the first year,  $\delta_{t2}$  is a standard deviation during the last year of the observed period,  $\beta$  is the regression coefficient,  $R$  is the square root of the coefficient of determination. In the case where  $\beta = R$  the GLI distribution is unchanged, if  $\beta > R$  the GLI dispersion is increased and if  $\beta < R$  there is a decrease in GLI dispersion.

The application of OLS regression in the aforementioned studies requires that IIT values have symmetrical, normal distributions and that extreme values are eliminated (Hoang, 2019). For this reason, it is necessary to transform the GL index into a TGL index by the formula:

$$TGLI = 2GLI - 1$$

The TGLI value ranges between -1 and 1, and zero represents a neutral point between inter-industrial and intra-industrial trade. In the calculation of OLS regression in this paper, GLI values will be replaced by the corresponding TGLI values.

The empirical data on exports and imports used in this paper are secondary data downloaded from the electronic database of the Statistical Bureau of the Republic of Serbia (RSZ, <http://data.stat.gov.rs>). The Statistical Bureau uses the fourth revision of the Standard International Trade Classification (SITC), data are presented by sections denoted by one digit (10 sections), divisions denoted by two digits (67 divisions), and groups representing the third level and denoted by three digits (262 groups). According to the United Nations Statistical Commission classification (2006) and the works of Durán Lima, Alvarez, & Cracau (2016) and Hoang (2019), agricultural commodities analyzed in the paper include sections 0, 1, divisions 21, 22, commodities 231; division 24, commodities 261, 263, 264, 265, 268, division 29, and sector 4. The Statistical Bureau of the Republic of Serbia also

uses the Nomenclature of Foreign Trade Statistics (NFTS) to display data on exports and imports of products, which is based on the Standard International Trade Classification. The hierarchical structure of NFTS by digit positions has the same appearance as SITCs up to the position level (5-digit codes) and contains the same number of sections, divisions, groups, subgroups and positions (items). NFTS has 4,079 products and the structure of the code is as follows: sections (1-digit codes), divisions (2-digit codes), groups (3-digit codes), subgroups (4-digit codes), items (5-digit codes) and NFTS products (5 + 2 digit codes) (Statistical Bureau of the Republic of Serbia, 2007, p. 20).

The GLI value increases with the level of aggregation i.e. the index will have lower value when calculated at more detailed levels (United Nations, 2012, p. 20). For this reason, GLI value in this paper was calculated at the group level, with 60 agricultural groups included, and at the NFTS product level where 867 products were covered in the period from 2004 to 2018.

### RESULTS AND DISCUSSION

In the observed period from 2004 to 2018, the value of Serbian agricultural exports increased fourfold, from USD 0.86 billion to USD 3.52 billion. Agricultural imports increased 2.3 times in the same period, from USD 0.94 billion to USD 2.17 billion. The foreign trade balance of agricultural products was positive during the analyzed period, except in the first year. In 2004, a deficit of USD 76.67 million was recorded. Since 2005, agricultural exports have outpaced imports, surplus growing from USD 131.76 million to USD 1.31 billion in 2018. During 2016, surplus reached USD 1.66 billion.

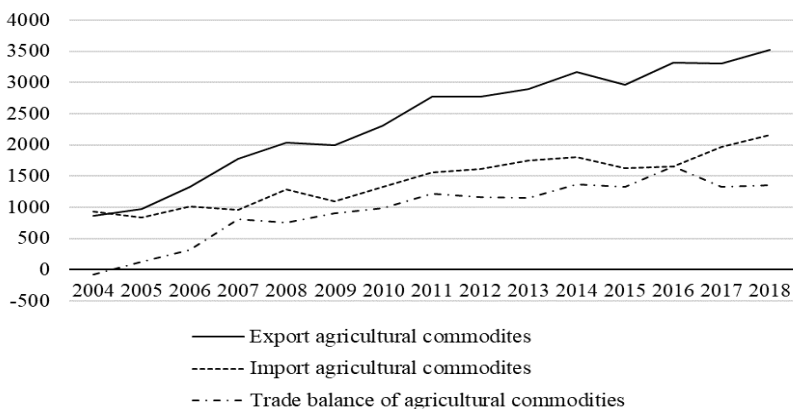


Figure 1. Value of export and import of agricultural products of Serbia 2004-2018. (In millions of USD)

*Measuring the Intra-industrial Trade Using the GL Index*

In this paper we used GLI to measure IIT by agricultural products between Serbia and its foreign trade partners. *Table 2* shows the commodity groups with the highest GLI value in 2018. Groups 001, 211, 098, 045, 073, 291, 431, 022 and 057 had a GLI value greater than 0.90 during 2018. Within these groups, GLI was highest for NFTS 0014910 (poultry domestic, live, weighing more than 185g) 0.93, 2112900 (other raw hides and skins of bovine animals, including butts, bends and bellies) 0.98, 0989900 (Other food preparations) 0.99, 0989490 (food preparations of flour, meal, starch or malt extract, n.e.s.) 0.96, 0459900 (cereals, unmilled, n.e.s.) 0.97, 0733000 (other food preparations containing cocoa, in blocks or slabs, whether or not filled) 0.94, 2919300 (guts, bladders and stomachs of animals, whole and pieces thereof) 0.70, 4312200 (vegetable fats and oils and their fractions, hydrogenated, inter-esterified, re-esterified) 0.87, 0221200 (milk and cream, of a fat content, by weight, exceeding 1% but not exceeding 6%) 0.96, 0579110 (melons and watermelons, fresh) 0.67.

However, interpreting GLI calls for caution. The GLI value increases with the level of aggregation, i.e. the index will have lower value when calculated at more detailed levels (United Nations, 2012, p. 20). For this reason, the GLI value in the paper was calculated at the group level and at the NSFT product level. This problem can be illustrated by the example of group 057 (Fruit and nuts (not including oilnuts), fresh or dried). There are 36 NSFT products within this group. The total GLI value at 057 group level is 0.918, while individually, at the NSFT product level, some products are characterized by inter-industrial trade, and the GLI value ranges from only 0.008 to a maximum value of 0.651.

The following table (*Table 2*) shows the GLI values for product groups where the value of exports was greater than USD 200 million during 2018, and includes the groups 058, 122, 044, 057, 041 and 081. The GLI value for these product groups ranged from 0.92 in group 057, which also belongs to the groups with the highest index value, to 0.008 in group 041, which is among the groups with the lowest index value. The last four groups represent products with the lowest GLI value in 2018, which include groups 041, 043, 422 and 231. Commodity group 041 is among the groups with the highest export value, so within this group a surplus is over USD 200 million. The surplus was also made with product group 043 and amounted to just over USD 14 million. In commodity groups 422 and 231, imports outstripped exports, so a significant deficit was observed in these groups.

*Table 2. Serbia's agricultural trade and intra-industry trade (top and selected) in 2018*

Code	Commodity	Export (million USD)	Import (million USD)	Trade balance	GLI
001	Live animals other than animals of division 03	44.16	43.71	0.45	0.994
211	Hides and skins (except furskins), raw	25.90	24.62	1.28	0.975
098	Edible products and preparations, n.e.s.	175.50	163.54	11.96	0.965
045	Cereals, unmilled (other than wheat, rice, barley and maize)	1.07	1.16	-0.086	0.962
073	Chocolate and other food preparations containing cocoa, n.e.s.	68.13	74.66	-6.53	0.954
291	Cruide animal materials, n.e.s.	6.62	5.80	0.82	0.934
431	Animal or vegetable fats and oils	4.73	4.11	0.62	0.930
022	Milk and cream and milk products, other than butter or cheese	63.74	54.10	9.64	0.918
057	Fruit and nuts (not including oil nuts), fresh or dried	215.64	183.00	32.64	0.918
058	Fruit, preserved, and fruit preparations (excluding fruit juices)	403.90	54.58	349.33	0.238
122	Other meat and edible meat offal, fresh, chilled or frozen	278.87	138.11	140.75	0.662
044	Maize (not including sweet corn), unmilled	266.75	18.49	248.26	0.130
081	Feeding stuff for animals (not including unmilled cereals)	202.93	102.57	100.36	0.671
041	Wheat (including spelt) and meslin, unmilled	210.38	0.84	209.54	0.008
043	Barley, unmilled	14.45	0.08	14.38	0.011
422	Fixed vegetable fats and oils, cruide, refined or fractionated other than "soft"	0.63	31.21	-30.58	0.040
231	231 - Natural rubber, balata, gutta-oercha, guayule, chicle and similar natural gums	1.10	47.02	-45.92	0.046

*Source: Author's calculation based on data by Statistical Bureau of the Republic of Serbia*

*Table 3* shows data on the number of NSFT groups and products broken down by IIT index value. The first group consists of products in which the IIT index values are between 0.50 and 0.75 and these products show weak intra-industry trade. The second group consists of products in which the value of the IIT index is between 0.75 and 1 and represents products with strong intra-industry trade. If viewed at the group level (3 digits), 33 groups were characterized by IIT 2018, while 27 were characterized by inter-industrial trade. Of these, 20 groups have shown strong IIT, while 13 groups have shown weak IIT. If observing based on the name of the NSFT product (7 digits) during 2018, the IIT was recorded in



185 products, which represented 18.2% of the total number of products. In the analyzed period, at the group level, the total number of IIT-dominated groups ranged from 26 in 2009 to 35 in 2015. Viewed at the NSFT product level, the number of IIT products ranged from 98 in 2005 to 158 in 2018. According to the data presented in the table, there is a noticeable increase in the number of groups and products characterized by IIT.

*Table 3. Number of NSFT groups and products characterized by IIT in 2004-2018 period*

	Weak		Strong		Total		Total	
	3-digit	NSFT	3-digit	NSFT	3-digit	(%)	NSFT	(%)
2018	13	94	20	64	33	55.0	158	18.2
2017	17	70	16	71	33	55.0	141	16.3
2016	11	78	23	65	34	56.7	143	16.5
2015	12	80	23	69	35	58.3	149	17.2
2014	15	84	18	54	33	55.0	138	15.9
2013	15	82	18	49	33	55.0	131	15.1
2012	17	70	15	60	32	53.3	130	15.0
2011	13	78	17	54	30	50.0	132	15.2
2010	16	62	15	54	31	51.7	116	13.4
2009	12	54	14	50	26	43.3	104	12.0
2008	12	77	18	51	30	50.0	128	14.8
2007	15	67	14	58	29	48.3	125	14.4
2006	11	61	19	56	30	50.0	117	13.5
2005	15	51	15	47	30	50.0	98	11.3
2004	15	63	17	43	32	53.3	106	12.2

*Source: Author's calculation based on data by Statistical Bureau of the Republic of Serbia*

### *Horizontal and Vertical Intra-industrial Trade*

When analyzing GLI, it is important to consider the share of horizontal and vertical IITs in the total index value. *Table 4* shows GLI values of agricultural products trade between Serbia and its foreign trade partners. As noted earlier, the index will have lower value if calculated at more detailed levels. For this reason, the GLI value was calculated at the group level (3 digits) and at the NSFT product level (7 digits) in the 2004-2018 period. Horizontal IIT (HIIT) is an exchange of products of similar quality, i.e. products that are differentiated by other attributes excluding quality. Vertical IIT (VIIT) is an exchange of products of different quality. Vertical IIT indicates significant differences in the quality of goods exported and imported. If the difference between unit values of exports and imports is lower than 0.85, then the quality of the exported product is worse than the quality of the imported product and it represents a low-quality vertical IIT. This IIT is shown in the table as VIIT1. If the difference between unit values of exports and imports is greater than 1.15,

it is assumed that the quality of the product being exported is better than the quality of the product being imported and this represents a high quality vertical IIT that is shown as VIIT2 in the table. Vertical IIT is equal to the sum of VIIT1 and VIIT2, while the total IIT is equal to the sum of horizontal (HIIT) and vertical (VIIT) intra-industrial trade.

In the observed period from 2004 to 2018, the total value of GLI for agricultural products, at group level (3 digits), ranged from 0.485 in 2004 to 0.590 in 2018. If the value is calculated at the NSFT product level (7 digits), the index value ranged from 0.248 in 2004 to 0.363 in 2018. In the observed period, there was an increase in the IIT index for agricultural products in Serbia. The lowest value of the IIT index was recorded in 2005 when it was 0.448. Since 2013, the IIT index has been higher than 0.50 every year. Vertical IIT is more prevalent in the structure of the IIT index. The data presented in the table indicate that VIIT1 accounts for about 50% of the total value of the IIT index. As noted above, the vertical IIT indicates differences in the quality of the traded goods and VIIT1 indicates that the quality of the exported product is worse than the quality of the imported product. Within the IIT for agricultural products between Serbia and its partners, the export of products with lower prices is more prevalent, i.e. according to the assumptions of the model, those are of lower quality than imported products.

*Table 4. GLI values for agricultural products of Serbia between 2004 and 2018*

	HIIT		VIIT1		VIIT2		VIIT		GLI	
	3-digit	NSFT	3-digit	NSFT	3-digit	NSFT	3-digit	NSFT	3-digit	NSFT
2018	0.116	0.090	0.298	0.167	0.176	0.106	0.474	0.273	0.590	0.363
2017	0.108	0.108	0.301	0.150	0.149	0.097	0.449	0.247	0.557	0.355
2016	0.111	0.063	0.225	0.157	0.166	0.092	0.391	0.248	0.502	0.311
2015	0.104	0.097	0.252	0.152	0.187	0.083	0.439	0.235	0.542	0.331
2014	0.137	0.081	0.266	0.146	0.168	0.095	0.434	0.241	0.571	0.322
2013	0.220	0.124	0.244	0.134	0.104	0.076	0.348	0.210	0.567	0.334
2012	0.138	0.105	0.207	0.113	0.135	0.069	0.342	0.181	0.480	0.286
2011	0.144	0.103	0.244	0.082	0.084	0.062	0.328	0.145	0.472	0.248
2010	0.164	0.091	0.233	0.091	0.069	0.073	0.301	0.164	0.465	0.255
2009	0.127	0.055	0.236	0.108	0.091	0.076	0.327	0.184	0.453	0.239
2008	0.089	0.059	0.272	0.129	0.122	0.072	0.394	0.200	0.484	0.260
2007	0.086	0.089	0.265	0.093	0.128	0.061	0.394	0.153	0.479	0.242
2006	0.049	0.087	0.280	0.106	0.156	0.068	0.436	0.174	0.486	0.261
2005	0.074	0.055	0.232	0.100	0.142	0.075	0.374	0.175	0.448	0.230
2004	0.092	0.053	0.213	0.123	0.180	0.071	0.393	0.195	0.485	0.248

*Source: Author's calculation based on data by Statistical Bureau of the Republic of Serbia*

Based on available data at the NSFT product level, the number of products characterized by horizontal and vertical IIT, as well as by inter-

industrial trade was calculated. The results obtained are shown in *Table 5*. Out of the total number of products, products where quantity data were not available were excluded. During the observed period, there was an increase in products characterized by horizontal IIT – from 81 in 2004 to 122 in 2018. In the same period, the number of products for which a difference between unit values of exports and imports is less than 0.85 (VIIT1) ranged from 166 in 2010 to 205 in 2016. The number of products where the difference between unit values of exports and imports exceeds 1.15 (VIIT2) increased significantly in the observed period, from 117 in 2004 to 210 in 2017. On the other hand, the number of products with recorded intra-industry trade and without any trade was declining. The results shown in *Table 5* point that during 2018, vertical IIT was recorded in 372 products, while horizontal IIT was recorded in 122 products. These results indicate that in Serbia, IIT in agricultural products most often includes products of different prices and quality.

*Table 5. Number of NSFT products according to the characteristic trade level*

year	HIIT	VIIT1	VIIT2	Inter-industry trade	non
2018	122	183	189	135	39
2017	107	189	210	118	45
2016	111	205	184	131	44
2015	124	171	193	139	46
2014	114	184	196	120	50
2013	127	168	185	152	42
2012	121	180	182	131	57
2011	121	178	166	143	63
2010	108	166	174	160	60
2009	90	190	167	154	70
2008	93	200	162	160	60
2007	94	187	151	178	63
2006	84	199	173	156	63
2005	77	176	139	199	80
2004	81	181	117	179	113

*Source: Author's calculation based on data by Statistical Bureau of the Republic of Serbia*

### *Dynamical Changes of GLI*

In several groups of agricultural products there were significant changes in GLI over the observed period. Groups 061, 091, 122, and 244, which at the beginning of the period were characterized by strong inter-industrial trade, during 2018 represented groups of products with weak IIT. The groups 025 and 211, classified as weak inter-industrial trade by GLI, became strong IIT groups. The most dynamic changes occurred in the 041 and 245 product groups, which changed from strong IIT at the

beginning of the period, to the strong inter-industrial trade at the end of the observed period.

*Table 6. Results of OLS regression*

2004 – 2011			2012 – 2018			2004 – 2018		
$\beta$	R	$\beta/R$	$\beta$	R	$\beta/R$	$\beta$	R	$\beta/R$
0.54	0.56	0.96	0.72	0.73	0.98	0.53	0.56	0.95

*Source: Author's calculation based on data by Statistical Bureau of the Republic of Serbia*

The results of the applied methodology and OLS regression for the three periods are shown in *Table 6*. In all periods  $0 < \beta < 1$ ,  $0 < R < 1$  while  $\beta/R < 1$ . According to the explained methodology, the obtained results indicate that certain changes occur and that the IIT pattern changes over time, i.e. high-value IIT product groups increase the value of inter-industrial trade and vice versa. Also, since  $\beta < R$ , the obtained result indicates that GLI dispersion decreased during the observed period. The values of the coefficients  $\beta$  and R indicate that changes occur gradually and that there are no sudden and fundamental changes. Changes were minimal, especially in 2012-2018 period.

### CONCLUSION

Agricultural products represent an important product group in the foreign trade of Serbia. In the 2004 – 2018 period, it participated on average with 21.7% in total export and 7.9% in total import. The average growth of agricultural products export in this period was 11%, slightly lower than the average annual growth of total exports of the Serbian economy, which amounted to 14%. On the other hand, the import of agricultural products grew at an average annual rate of 7%, while total import grew at an average annual rate of 8%. The balance of foreign trade of agricultural products in the observed period was positive, except in the first year when import of agricultural products was higher than export.

The paper analyzes the values of GLI for agricultural products at group level (3 digits) and NSFT product level (7 digits) between Serbia and its foreign trade partners. The index value ranged from 0.448 to 0.590 (3 digits). When calculating the value at the NSFT product level (7 digits), the index value ranged from 0.248 in 2004 to 0.363 in 2018. As GLI increases with the level of aggregation, data used in the paper were at the group level and the NSFT product level. From the results presented, it can be concluded that the aggregation problem is especially emphasized in group 057. Some of the NSFT products within this group are characterized by IIT, with the highest GLI value being 0.651. A more detailed analysis indicates that this group is more characterized by inter-industrial trade, although GLI values at the group level indicated a strong IIT. Not-

withstanding the above examples, the overall GLI results at the group level and NSFT product level indicate that the pattern of trade is changing and that IIT is becoming more and more represented in foreign trade in agricultural products in Serbia.

The data presented in the paper indicate that IIT over time gains importance in the exchange of agricultural products between Serbia and other countries. The number of products for which simultaneous export and import is registered increases from year to year, while the number of products with characteristic inter-industrial trade is decreasing. The obtained results show increase of HIIT, i.e. the exchange of products of similar quality and price. During the observed period, the share of NSFT products characterized by HIIT increased from 11.8% to 17.8%. Also, a significant growth was achieved in VIIT. The share of NSFT products characterized by VIIT1 did not change significantly, so the share of these products in 2004 was 26.3%, while in 2018 it was 26.6%. The most significant growth was achieved in NSFT products characterized by VIIT2, because the share of these products increased from 17.0% at the beginning of the observed period, to 27.5% in 2018.

The largest part of the IIT of Serbia, measured by the GL index, represents the vertical IIT. According to the obtained results, the low-quality vertical IIT (VIIT1) makes about 50% of the total value of the IIT index. According to theoretical assumptions, vertical trade is characteristic of the exchange of goods of different quality, and VIIT1 indicates that the quality of an exported product is worse than the quality of the same imported product. Based on the obtained results, it can be concluded that the IIT of agricultural products between Serbia and its foreign partners is dominated by the export of lower-priced products, i.e. those that are, according to the model assumptions, of the lower quality, and the import of the same products but of higher quality. Similar results in the analysis of the surrounding countries and countries that later joined the EU were obtained by Jám bor (2015 and 2011) and Fertó (2015). Although VIIT1 makes up over 50% of the value of the GL index, the number of products within VIIT2 has increased significantly. This indicates the increase of the number of agricultural products in which the quality of the exported product is better than the quality of imported products. However, the value of foreign trade in these products in total foreign trade is significantly lower than the value of foreign trade in products characterized by VIIT1, which explains the higher share of VIIT1 in total IIT.

The analysis of the dynamic changes using OLS regression shows that there is a change in the pattern of IIT over time and that certain groups of products that were characterized by inter-industrial trade increase the value of IIT and vice versa. However, the ratios of the coefficients  $\beta$  and  $R$  show that changes occur gradually over a longer period of time and that there are no sudden changes in the pattern of trade and the

structure of IIT, which was especially characteristic for the period between 2012 and 2018.

This paper is the starting point for the analysis of IIT of agricultural products in Serbia. In further research and IIT analysis, it would be important to analyze individual data for the countries with which the exchange was made. Further analysis would also require identifying the reasons for the changes, the reasons for imports of agricultural products of similar quality, and the potential problems encountered by domestic farmers in the case of imports of agricultural products of similar quality. Empirical data presented in the paper can be used for further analysis and the definition of measures and policies that would help to improve the quality of exported agricultural products in comparison to the imported ones and to improve the competitiveness of the agricultural sector of Serbia.

**Acknowledgment:** This paper is the result of research on obligations under the Agreement on the Implementation and Financing of the Scientific Research in 2020 (registration number 451-03-68 / 2020-14 / 200100) concluded between the Ministry of Education, Science and Technological Development of the Republic of Serbia and the Faculty of Economics, University of Niš.

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## ИНТРАИНДУСТРИЈСКА ТРГОВИНА ПОЉОПРИВРЕДНИМ ПРОИЗВОДИМА У СРБИЈИ

**Ђорђе Ђузовић<sup>1</sup>, Светлана Соколов-Младеновић<sup>2</sup>**

<sup>1</sup>Висока пословна школа струковних студија, Нови Сад, Србија

<sup>2</sup>Универзитет у Нишу, Економски факултет, Ниш, Србија

### Резиме

Услед пада транспортних трошкова, либерализације међународне трговине, стварања економских интеграција, у другој половини 20. века долази до интензивирања међународних трговинских токова. Упоредо са растом размене производа различитих сектора привреде, долази и до раста размене производа истих сектора привреде. Најчешћа дефиниција интраиндустрijske трговине је да она представља истовремени извоз и увоз сличних производа или услуга од стране исте државе.

Прве студије које су се бавиле феноменом интраиндустрijske трговине (ИИТ) спроведене су шездесетих година 20. века (Verdoorn, 1960, Balassa, 1966), а након то-

га објављена је обимна литература која анализира ову област. Велика пажња истраживача посвећена је изучавању ИИТ, јер је у супротности са традиционалним теоријама међународне трговине.

Поред индустријских производа, где је ИИТ и прво уочена, ИИТ постаје све чешћа и код пољопривредних и прехранбених производа. Према подацима Републичког завода за статистику, учешће пољопривреде у БДП-у 2018. године износило је 7%, док је извоз пољопривредних и прехранбених производа чинио 18,3% вредности укупног извоза.

У раду је анализирана интраиндустријска трговина пољопривредним производима Србије и њених спољнотрговинских партнера у периоду од 2004. до 2018. године. Обим ИИТ у раду мерен је Грубел–Лојдовим индексом (Grubel-Lloyd, 1975), који се ослања на индекс који је раније развио Баласа (Balassa 1966). Вредности Грубел–Лојдовог индекса (GLI) крећу се од 0 до 1 и показују сличност размене две земље. Што је вредност индекса већа, већи је интензитет ИИТ. Индекс има вредност 0 када нема производа у оквиру исте класе који су извезени и увезени ( $GL_i = 0$ ;  $X_i = 0$  или  $M_i = 0$ ), док је индекс једнак 1 када је вредност извезених и увезених производа у оквиру исте класе једнака ( $GL_i = 1$ ;  $X_i = M_i$ ). Због осетљивости индекса на ниво агрегације, вредност GLI је у раду рачуната на нивоу група и обухваћено је 60 пољопривредних група и на нивоу производа НССТ, где је обухваћено 867 производа у периоду од 2004. до 2018. године.

У посматраном периоду од 2004. до 2018. године, укупна вредност GLI пољопривредним производима, на нивоу група (3 цифре), кретала се од 0,485, колико је износила 2004. године, па до 0,590, колико је износила 2018. године. Уколико се вредност рачуна на нивоу производа НССТ (7 цифара), вредност индекса се кретала од 0,248 (у 2004. години) до 0,363 (у 2018. години).

Једна од карактеристика ИИТ пољопривредним производима у Србији је да је вертикална ИИТ заступљенија од хоризонталне ИИТ. Према добијеним резултатима, ВИИТ1 чини око 50% укупне вредности индекса ИИТ. Према теоријским претпоставкама, вертикална трговина је карактеристична за размену роба различитог квалитета, а ВИИТ1 указује на то да је квалитет извозног производа слабији од квалитета увозног производа. Добијени резултати указују на то да у оквиру ИИТ пољопривредним производима Србије и њених партнера доминира извоз производа који имају ниже цене, тј. који су према претпоставкама модела слабијег квалитета.

Анализа динамичких промена применом ОЛС регресије показује да долази до промене обрасца ИИТ током времена. Према добијеним резултатима у периоду од 2004. до 2018. године, дошло је до смањења дисперзије GLI. Ипак, односи коефицијената  $\beta$  и  $R$  показују да се промене у дужем временском периоду дешавају постепено и да нема наглих промена у обрасцу трговине и структури ИИТ.



## MACROECONOMIC ASPECTS OF PUBLIC-PRIVATE PARTNERSHIP

Aleksandar Đorđević<sup>1\*</sup>, Biljana Rakić<sup>2</sup>

<sup>1</sup>Science and Technology Park Niš, Niš, Serbia

<sup>2</sup>University of Niš, Faculty of Economics, Niš, Serbia

### Abstract

Public-private partnership (PPP) has been getting momentum in market economies since the 1990s. Originally, it was created as a way of financing infrastructure projects, but its application since then has covered areas such as education, healthcare, high technology and many others. As the bulk of research in the domain of PPP is on the microeconomic impact and the analysis of the success of concrete PPP projects, the aim of this paper is to integrate these findings into a broader framework depicting macroeconomic aspects of public-private partnership. The existing literature, although not as extensive, points to several aspects that may affect economic development on the local, regional, and national levels, with greater adoption of PPP projects and their implementation. The paper introduces explanations for the elements of risk sharing between public and private partners, economic benefits, and costs in PPP, as well as the specific PPP channels of influence on the national economy and the PPP system dynamic model. One of the objectives is the analysis of the existing concept for estimating macroeconomic impacts of PPP, which could be used for evaluating its potential contribution to the growth and development of the national economy.

**Key words:** public-private partnership, risk in PPP, benefits of PPP, SD model.

## МАКРОЕКОНОМСКИ АСПЕКТИ ЈАВНО-ПРИВАТНОГ ПАРТНЕРСТВА

### Апстракт

Јавно-приватно партнерство (ЈПП) почело је интензивније да се примењује у привредама западних земаља од деведесетих година двадесетог века. Првобитно је креирано као начин финансирања инфраструктурних пројекта, међутим, његова примена сада обухвата и области попут образовања, здравства, високе технологије и многих других. Како већина истраживања из домена ЈПП говори о микроекономском утицају и анализи успеха конкретних пројеката ЈПП-а,

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\* Аутор за кореспонденцију: Александар Ђорђевић, Научно-технолошки парк Ниш, Александра Медведева бб, 18000 Ниш, Србија, [aleksandar.djordjevic@ntp.rs](mailto:aleksandar.djordjevic@ntp.rs)

намера аутора овог рада је интеграција тих налаза у шири оквир који приказује макроекономске аспекте јавно-приватног партнерства. Постојећа литература, иако не тако обимна, указује на неколико аспеката који могу утицати на економски развој на локалном, регионалном и националном нивоу, ширим усвајањем пројеката ЈПП и њиховом применом. У раду су представљени елементи поделе ризика између јавног и приватног партнера, економске користи и трошкови у ЈПП, као и посебни канали утицаја ЈПП на националну привреду и модел динамичног система ЈПП. Један од циљева је анализа постојећег концепта за процену макроекономског утицаја ЈПП, који би се могао користити за процену његовог могућег доприноса расту и развоју националне економије.

**Кључне речи:** јавно-приватно партнерство, ризик у ЈПП, користи од ЈПП, СД модел.

## INTRODUCTION

A single definition of Public-Private Partnership (PPP) in its modern form cannot be stated (Engel, Fischer & Galetovic, 2014). Some of the characteristics include longevity of partnership, participation of public and private entities, sharing risks between public and private partners, or/and creating a new company for undertaking a specific project. That new company is usually called a “special purpose vehicle” (Välilä, 2020, p.2). It is used for “financing, construction, operation and maintenance of infrastructure or other assets and delivering previously determined standard of services” (Välilä, 2020, p.2). There is no unanimity regarding the definition, but it is even more challenging to make proper analysis of PPP’s impacts on the macroeconomic level due to limited data, interconnections and causalities. Several studies about the macroeconomic impact of PPP lead to divergent conclusions. For example, in the most recent study with an econometric approach, Trujillo *et al.* (2018) analysed successes and failures of PPP transport projects and discovered that the inclusion of private sector in transport projects positively affects income per capita. Some authors like Rhee and Lee (2007) found that investing in PPP does not lead to expected results, as the analysis in South Korea showed that investment in PPP does not indicate a significant relationship with economic growth. Also mentioned are the crowding out and crowding in effects, implying that the increase of investment in PPP associates with a decrease in public investment, and an increase in private investment. Other authors like Kim *et al.* (2011) found a generally positive impact of implementing PPP projects on national economic development. Traditional procurement is missing structural and functional features which make PPP more effective for infrastructure development. Partners divide the risk according to the capabilities in dealing with the specific risk type, attention is committed to details in providing and delivering products and services, new ways of gathering necessary funds are introduced and private organisational and managerial skills are being used. Although theoretical arguments are in favour of

PPP and propose many economic benefits, empirical evidence remain very thin (Lee, Han, Gaspar & Alano, 2018).

Partnership relies on the private sectors` expertise, organizational models, technology and soft skills which appear necessary during the undertaking, particularly with limited fiscal resources (Iossa & Martimort, 2015; European PPP Expertise Centre, 2015; de Bettignies & Ross 2004). When signing a contract, the private entity commits itself to deliver a project timely, respect the target expenditures and maintain the assets according to the stipulated terms. Therefore, it is expected that PPP accomplishes a higher level of quality and performance than the traditional procurement (Davies & Eustice, 2005). Some studies indicate that partnership guarantees good value for money because the selected PPP project is the best among other alternatives based on expected benefits compared with associated costs of a project. PPP model contains an incentive for the private partner in designing and building assets under lower price and reducing costs of maintenance until the contract ends and the asset is returned to the public sector (Davies & Eustice, 2005; Henckel & McKibbin, 2010; Iossa & Martimort, 2015).

Change and development are inevitable in everything and so is the case with the public sector. New economic circumstances require an adequate response. The public sector needs to resemble to the private one more, and apply as many rules and principles from the private sector as possible. Public services ought to be tailored to the needs of end users. Decentralization, flexible structure with less hierarchy levels and more individual autonomy, as well as clear responsibility are more than needed in public management. The private sector`s involvement could help to decrease the number of employees in public services, as overemployment is an inherent problem in the public sector. Supporters of new public management emphasize narrowing the gap between the public and private management (Rakić, 2011). As public sector can never become the same as the private one, an optimal mixture of the two is being made through the forms of public-private partnership. By dividing the responsibilities and risks between the public and private partners, the concept of PPP tries to solve some old and some new problems in public sector administration. In the following section, benefits and costs of PPP will be discussed. This paper mainly relies on secondary data analysis and the synthesis of previous results in order to review and analyse the macroeconomic aspects of public-private partnership. The lack of data especially for Serbia makes empirical tests difficult to perform at this point.

### *RISK-SHARING, ECONOMIC BENEFITS AND COSTS OF PPP*

The question of risk allocation is one of the most important in every business endeavour and especially if there are several subjects who ought to share that risk. Long term and high value of the PPP projects are

significantly contributing to the complexity in this regard. For example, infrastructure projects involve many risks, per se. If they are going to be realised through a public-private partnership, it is necessary that the arrangements of the risk allocation go towards the party that is more capable of dealing with them. The fulfilling of PPP contract obligations should be incentivized by adequately assigning risk among involved parties. If they are not adequately formulated, PPP contracts may generate high costs, not only private ones, but also social, as they would usually be covered, ultimately, by taxpayers. Making an analogy to big socialist companies which, once they encountered a loss and a fall in production and sales, never got back on track, some authors compare badly written infrastructure projects to white elephants (Engel, 2016; Henckel & McKibbin, 2010). To avoid this, all aspects of PPP must be carefully considered, and maybe even more importantly, backed up by strong institutions. The strengthening of the institutions is not only valuable for PPP projects, but also for other venture capital undertakings and national economy in general. The longevity of infrastructure assets determines a limited number of choices for a government on how to procure them. Contracts with public and private entities are more complex due to exceptionally long execution time and the uncertainty about how it could affect both the project and the parties involved. Risk management and risk sharing analysis have to consider asset or service attributes, as well as expenditures during the project life cycle. If one divides the risks involved, exaggerating the cost of production would be one of the most important endogenous risk, usually borne and controlled by the private entity, while service or product demand represents an exogenous risk, which is usually borne by the public entity, although in most cases the demand cannot be adequately predicted. Academic circles give more attention to the former - the mentioned risk, but the latter is also worth the attention. Engel et al. (Engel et al., 2013) analysed it, especially as it represents one of the key risks in transport projects, for example PPP for a highway or a tunnel. Optimal risk sharing contracts among partners should specify a contractible quality of service and not involve any moral hazard problems.

If PPP and traditional public procurement are compared, it is usually stated that the first one is more efficient although sometimes it produces higher expenditures. Value for money is the concept being used to make this comparison (UK HM Treasury, 2006; UK Department for Transport, 2015). More thorough research would include a detailed assessment of given choices and, in praxis, it usually comes down to the evaluation of their effect on the public budget. Buffie *et al.* (2016) compare the results if the investment is made through PPP or through public procurement. They conclude that PPP is associated with higher expenditures, but they also have better time management, complete projects on time and produce higher quality infrastructure. Also, they notice that PPP reduces “underinvestment in public cap-

ital, underinvestment in infrastructure, unemployment and poverty”, and find that “impact on macro externalities, specifically social return in PPP is 2-9 % higher relative to own public investment” (Buffie *et al.*, 2016. p. 26).

Micro and macroeconomic analyses of PPP have clear differences. The public partner’s aim is securing the best possible arrangement by maximizing the incentives for delivering adequate assets while keeping the expenses as low as possible. In macro analysis the expenditures that the government endures are subtracted from the return of the PPP project. The result is compared to the net return calculated if public sector invested without making a partnership (Buffie *et al.*, 2016). Some authors like Tirole (2009) suggested a framework to analyse pre-contractual transaction costs, but it was not applied to the specific problem.

Institutional, political, and fiscal context influence on the choice of the procurement method. To analyse the benefits and costs, the identification of the relevant groups of stakeholders on the market needs to be conducted. This means that the analysis should be extended beyond economic parameters (Leviakangas, 2019). As PPP is not solely an economic issue, politics surrounding PPP projects needs to be observed carefully and in depth as it plays an especially important role. Governments, particularly the ones with constrained budgets and restrictive fiscal policy, must find a way to invest in infrastructure and social services. Public-private partnership is one of the best means to attract private capital to participate in building public assets. This shows that PPP will become more and not less important in the future.

#### *THE CHANNELS OF PUBLIC-PRIVATE PARTNERSHIP IMPACT ON MACROECONOMIC PARAMETERS*

According to the Asian Development Bank (Arezki *et al.*, 2016) PPP could mostly positively affect national development by influencing certain channels:

- Improved access to infrastructure
- Improved technical and institutional capacity, transparency and organizational skills
- Facilitated allocation of public resources
- Attracting private savings through long term investments

Improved access to infrastructure is the first and most evident channel.

Due to the transfer of operating risks, the private partner is more likely to increase the quality of infrastructure. The second channel points out the benefits from the improvement of the technical and institutional capacity, transparency, and organizational skills. All of these are brought to the public sector from the partnership with the private entities. Facilitated allocation of public resources by using PPP represents the third channel. This is explained as PPP are used for infrastructure services, public sector can invest more into

education, health, and social security. Luring unused and uninvested private funds into long-run investments via PPP is addressed by the last channel. These funds include various mutual institutional funds, savings, as well as individual private savings. Directing these savings towards lucrative PPP projects optimizes income redistribution while contributing to national development (Arezki *et al.* 2016). According to Lee *et al.* (2018) some empirical evidence indicates significant macroeconomic contribution of PPP. It is said that social and pro-poor infrastructure play an essential role in reducing poverty through enhancing access to infrastructure and markets (Lee *et al.*, 2018). For a PPP to be successful it requires certain preconditions to be fulfilled. Some of the most obvious ones are quality and well-defined institutions. Some authors like Hammami, Ruhashyankiko & Yehoue (2006) associate a higher degree of PPP implementation with lower levels of corruption, as well as strict and rightful governance. Schomaker (2014) indicates the correlation between a higher degree of institutional quality and providing public services with the participation of private funds.

Different channels through which macroeconomic performance can be affected by PPP are presented in Figure 1. Infrastructure-growth link is made stronger if the partnership provides quality outcomes, does that timely and maintains the project adequately. Iossa and Martimort (2015) consider that packing various phases of providing infrastructure engaged with PPP leads private sector to more investment in the quality of goods compared to ordinary procurement. Advanced competencies that are necessary to be developed for complex PPP contracts will also be beneficial for reinforcing institutions. It can have multiple advantages as good technical capacity and good governance are beneficial in many public services. The second channel refers to the fact that infrastructure PPP allows the public sector to use more resources for services intended to develop human capital and social security. Lucrative PPP infrastructure projects could captivate income surpluses and assets from various investment funds and direct them towards important social projects. This could also affect income redistribution and attainment of not only economic, but also social goals. (Arezki *et al.* 2016).

There is also one specific link in Figure 1 which shows the 5P or “Pro-Poor Public-Private Partnership” (Lee *et al.*, 2018, p. 6). Its goal is to develop a utility which will help poor societal groups via PPP. Providing energy through ecofriendly sources and making it available to the lowest income groups are some examples of these projects, carried out in underdeveloped countries (UNESCAP, 2014). “Developed countries have more projects that are in the category of social infrastructure and developing ones have more in the economic infrastructure part” (Djordjević & Rakić, 2020, p.13). Building improved infrastructure, PPP contributes to economic growth which will in the long run affect the poor through stimulating employment and improving

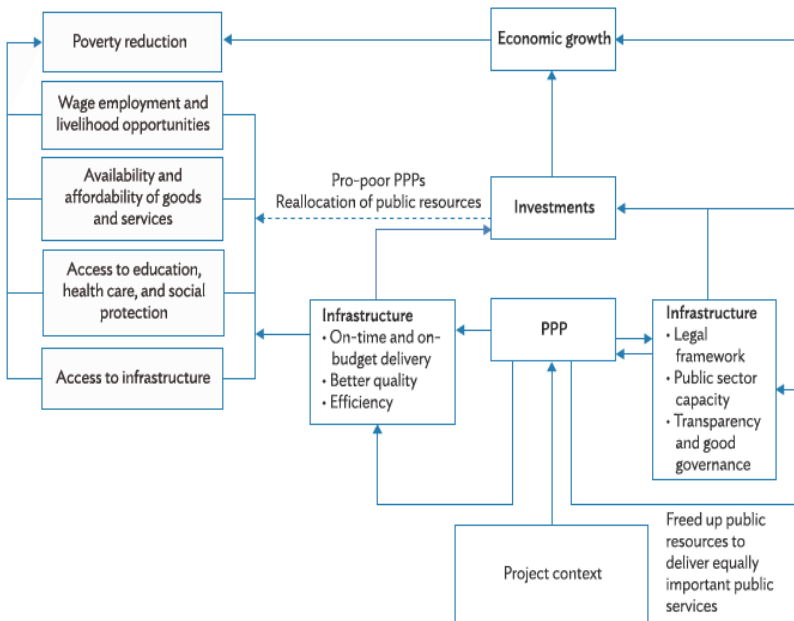


Figure 1. Public-private partnership channels of impact on national economy  
 Source: Lee et al. (2018). p. 6

the quality of life. As low-income households spend more on basic goods and services, they ought to have access to the infrastructure they can afford. Wallich (2002) noted that the poor often cannot choose and are forced to use expensive alternatives for safe water and electricity. As it can be seen in Figure 1, most PPP impacts are transferred to macroeconomic parameters through infrastructure development, as economic development is very dependent on the quality level of the infrastructure. As a determinant in the analysis, PPP are involved as ratio between the value of PPP projects compared to the generated GDP. Public-private partnership investment boom leads to GDP growth. That can be seen on the following graph in Figure 2, from the authors Lee et al. (2018) where they state:

“The difference in economic growth reaches more than 2% but stabilizes 4 years later. Even so, this does not put the long-term growth impacts of PPPs in question, given the expected productivity improvements associated with better infrastructure”. (Lee et al., 2018, p.9).

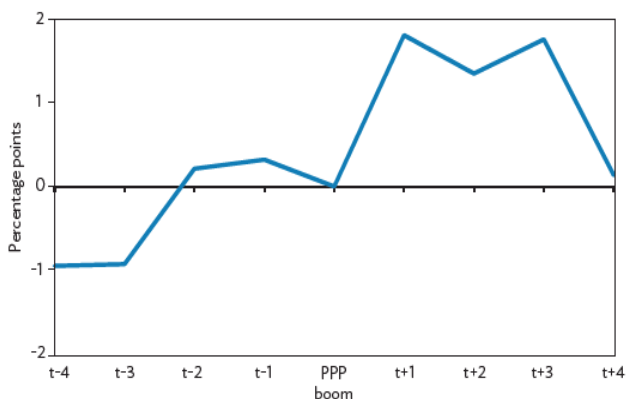


Figure 2. GDP increase prior to and after investing in PPP  
Source: Lee et al. (2018) p.10

Another conclusion from the aforementioned analysis states that the implementation of PPP contributes to public institutions' capacity to handle complex projects in other different areas. The realisation of a PPP project leads to the re-examining of regulations and policies and consequently the improvement of public management and capacity (Lee et al., 2018.).

It is indicated that PPP projects not only increase access to infrastructure but also, if the contracts are adequately made, enhance the quality of infrastructure services. Coefficients that were positive and significant in the tests are from energy sectors, telecommunications, water supply and sanitation. Access to telecommunications, specifically the number of mobile phones, showed one of the highest coefficients. This, however, also coincides with the general trend of increasing mobile phone subscriptions due to the private sector participation in this field (Prachitha, Mahalingam, Deep, & Thillairajan, 2015).

Table 1. Effect of increasing PPP investment in ratio to GDP in Developing Asia

Variable	PPP ratio increase to 1%	PPP ratio increase to 2%	PPP ratio increase to 3%
Increase in real per capita GDP growth (%)	0,1	0,3	0,4
Reduction in the number of people without electricity (mil.)	14	41	69
Reduction in the number of people without proper sanitation (million)	16	47	78
Reduction in the number of people without safe drinking water (million)	12	36	60

Source: Lee et al. (2018) p. 15



Table 1 indicates the approximate results of increased investing in PPP as the ratio of GDP in developing Asia in some social categories and thus covering 5P which builds community-based utilities. This estimation was made based on the results from 2015 and the ratio of PPP to GDP of 0.5% (Lee et al., 2018). It shows that an increase of the percentage of PPP relative to GDP growth induces exponential growth of other social variables listed in the table and implicates a multiplier effect of investing in PPP.

Checherita (2009) indicates and analyzes 5 possible channels of PPP influence on some macroeconomic parameters:

1. Impact on aggregate private and public investment
2. Impact on government budget balance
3. Impact on government debt
4. Impact on fiscal risks
5. Impact on GDP growth rate” (Checherita, 2009, p. 86).

The first effect of PPP is raising private as well as public investment. This is usually noticed in the state budget in the position of private gross capital. This was proven on the sample of developing countries in South America: Argentina, Bolivia, Brazil, Chile, Colombia, Mexico and Peru. The connection with public investment is more complex and indicates a substitution effect. This means that more investments in PPP cause less investments in solely public assets in the coming years. Governments are trying to reduce the part of public infrastructure investing by directing their funds towards PPP. Nevertheless, this was not proven to be true on the whole sample of Latin America, although some countries like Argentina, Chile and Brazil have the most PPP programs with the highest value and the lowest ratio of public investment to GDP.

Maybe one of the most beneficial effects of PPP is its influence on the fiscal policy and national budget, more specifically on the public and publicly guaranteed debt. Not only that the government is not investing its own funds, and thus reducing the expenditure side, but also PPP projects are contributing to the revenue side of the budget. This connection is not necessarily proven in the developing countries due to many other expenditures, but certain evidence exists that engaging in large PPP projects has a positive impact on the fiscal stance. In general, this means reducing the government debt.

Empirical effect of PPP on fiscal risk is ambiguous. Partnership contributes to budget balance and the reduction of government debt, but large PPP projects could lead to higher fiscal risk. Reducing public investments as private ones are being used positively affects budget balance and government debt. If it happens that a project unfortunately fails and the contract is abandoned by the private partner, the public sector will be the one bearing the consequences, and citizens will have to pay indirectly through taxes.

As the most valuable macroeconomic variable is economic growth, most important goal for a government to launch PPP projects is to ensure that they can provide quality and constant services or goods. The period

taken for the research is fifteen years (1990-2005), due to, especially, the longevity of the PPP contracts, and it is very hard to draw valuable conclusions about the correlation between PPP projects and economic growth. Bearing in mind that many other factors affect economic growth makes it even harder to isolate this specific connection (Checherita, 2009, pp. 84-125). Nevertheless, Checherita states:

“When I extend the sample period to 1980-2005 and use instead actual investment spending data from Calderon and Servén (2004), I find that private investment in infrastructure has had, on average, a positive impact on growth in the LA countries under analysis. This impact has mainly originated from private investment in roads a component undertaken mostly under PPP programs” (Checherita, 2009, p. 121).

There is a possibility to extend this survey and apply the given methodology on current data, using the same countries as the author, or transferring it to South-Eastern Europe where this kind of research has never been done. The lack of comparable data, especially for the Republic of Serbia is the biggest obstacle in conducting this kind of research. If the data would be provided, it would be the future plan of the authors to implement a similar kind of analysis.

#### *USING SYSTEM DYNAMICS MODEL TO EXPLAIN MACROECONOMIC IMPLICATIONS OF PPP*

All public-private partnerships share a lot of common things and although there are many specific aspects about a certain project, sector or a country, the system dynamics model is built on the assumption that PPP forms are essentially identical. Usually a private entity makes an agreement with the public one to design, build, finance and operate a property over a longer period, often over 20 years. The public entity pays for that regularly to the private one via pre-agreed installments during the contract period, under the condition that the provided services meet the required standards. These payments are called unitary charges. In certain circumstances as a delay in construction, non-operational facility or services below standard quality installments may be reduced accordingly. This model assumes that the only way to finance a project is through a PPP as this study evaluates projects' economic and social sustainability (Pagoni & Patroklos 2019.).

As all public-private partnership projects together represent a relevant part of a national economy and affect creating jobs, capital forming and spread those effects further this SD model is created to interpret their growth (Parker, 2009). The public sector is concerned about the price as it needs to withstand future payments, whereas the private entity is willing to fund the project if it is profitable. From the point of view of capital market,

financial institutions rely on the experience from previous successful PPP arrangements when deciding on financing further projects (Galilea & Medda, 2010). The ability of the public sector to consistently repay instalments depends on the domestic market size, i.e. the number and financial capability of taxpayers (EIB, 2015).

If PPP is implemented in accordance with the development strategy and in sectors that provide a lot of jobs, it has a twofold effect. Unemployment is decreased and the labor market situation is improving, thus the number of taxpayers is increased. If it is not solved, among many other problems, unemployment leads to a decrease in the number of taxpayers and an increase of individual savings from precaution measures (Bentolila & Ichino 2008).

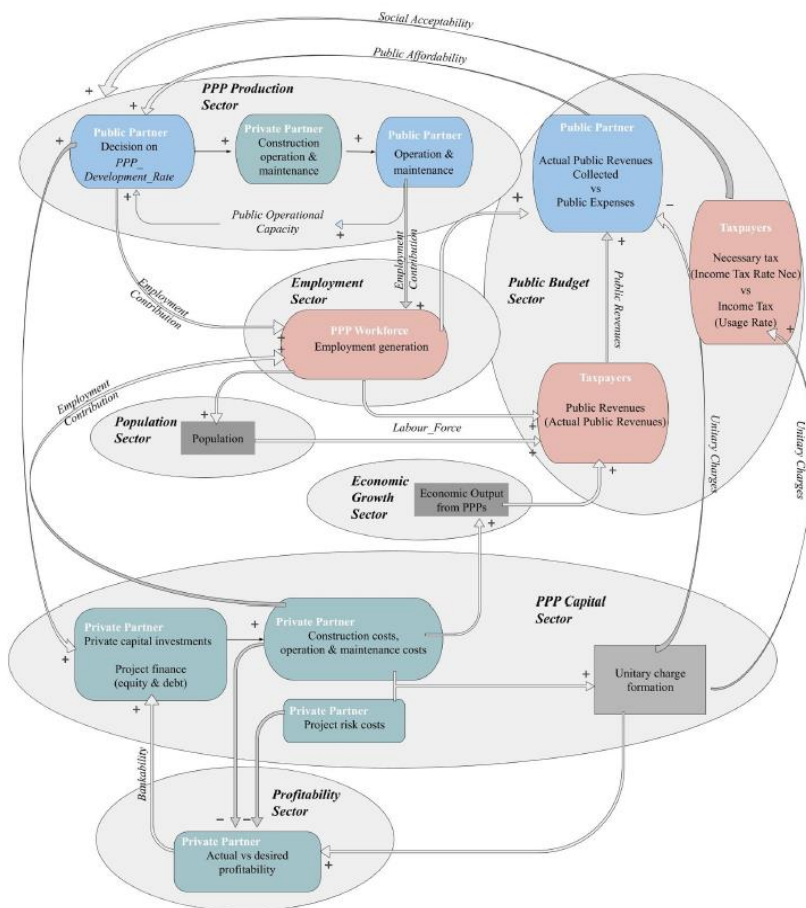


Figure 3. System dynamics model of PPP

Source: Pagoni & Patroklos (2019). p. 5

In Figure 3, links between different shareholders in PPP can be seen. There are public partners as public bodies, private partners in the form of investors and employees and taxpayers representing society. The system dynamics model is comprised of “seven sectors: PPP production, employment, PPP capital, profitability, economic growth, population, and public budget” (Pagoni & Patroklos 2019, p.5). Until recently PPP literature was mainly focused on a case or type of projects, but this paper introduces a holistic approach of PPP successfulness and its sustainable development at the national level. The model shows how the system’s internal structure and policies, the investors, the government and society, are related to national PPP programs. In addition to the private and public entities, the social dimension of PPP sustainable development has also been perceived.

### *CONCLUSION*

This paper presents the macroeconomic aspects of public-private partnerships. PPP itself is not known or talked about enough so the introduction deals with the definition of the term and some of its basic determinants, as well as the macroeconomic aspects. The risks and its division in the formation and conclusion of PPP contracts between public and private entities were considered. The idea is that each entity bears the type of risk for which it has the most capability and that it is divided accordingly. The benefits as well as the costs of implementing and maintaining a PPP contract were then processed. The emphasis is, in addition to many microeconomic advantages (raising the quality of services, efficient management, the reduction of public sector costs), on macroeconomic benefits in the form of the reduction of public debt of the state, impact on employment, directing individual and group savings, fiscal budget, GDP growth rate. In terms of costs, one of the evident reductions is the pre-contractual activities and research that is necessary for the public sector to carry out. Then there are the annual fees that the public sector pays to the private sector if they are contracted. Afterwards the channels through which public-private partnerships exert a broader impact on the national economy are described. Four channels are mentioned: higher quality infrastructure; improved technical and institutional capacity, transparency, and organizational skills; facilitated allocation of public resources; the ability of PPP to attract private savings into long-term investments. Methodology used in the previous researches, as well as some empirical findings, is presented. The last segment uses the system dynamics model to present how the public-private partnership affects macroeconomic parameters. Socio-economic interactions among system actors are presented. There are public partners as public authorities, private partners in the form of investors and employees, and taxpayers representing the company. The system dynamics model is comprised of seven sectors: PPP production, employment, PPP capital, profitability, economic growth, population, and public budget.

The successful implementation of public private partnership projects, considering that they contribute to infrastructure service quality, maintain and deliver projects on time, besides the fact that infrastructure has a strong bond with economic growth, indicates that consequently PPP could also be linked to economic growth. In the paper, some channels through which PPP can potentially contribute macroeconomic benefits have been presented. In order to carry out a PPP, the public sector needs to strengthen their institutional capacity as well as laws and regulations for PPP undertakings. Authorities also need to be transparent and well governed. Equally important are transparency and good governance. All these improvements could lead developing economies to invest more in other public services that target the poor as social protection or different subsidies. The private sector can engage in attaining the national development goal by using PPP. They have the potential to attract long-term savings and direct them towards long-horizon infrastructure projects. Adequately implemented public-private partnerships inevitably lead to an overall improvement and advancement not only for the local development and regions, but for the whole national economy.

Paper dominantly analysed the macroeconomic dimension of the public-private partnership. It presented channels of impact and the methodology for accessing PPP and using it to improve growth and development of national economies. Further research will be aimed towards analysing the situation of PPP in Serbia and in the region.

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## МАКРОЕКОНОМСКИ АСПЕКТИ ЈАВНО-ПРИВАТНОГ ПАРТНЕРСТВА

Александар Ђорђевић<sup>1</sup>, Биљана Ракић<sup>2</sup>

<sup>1</sup>Научно-технолошки парк Ниш, Ниш, Србија

<sup>2</sup>Универзитет у Нишу, Економски факултет, Ниш, Србија

### Резиме

У овом раду представљен је макроекономски аспект јавно-приватног партнерства. У уводу је дефинисан појам, неке његове основне одреднице, као и утицај на макроекономију. Сагледани су ризици и њихова подела приликом формирања и склапања уговора о ЈПП између јавних и приватних субјеката. Идеја је да сваки ентитет сноси онај тип ризика који има највише способности да контролише и умањи га, те да се на основу тога врши подела. Затим су обрађене користи и трошкови приликом примене и одржавања уговора о ЈПП. Акцентат је, поред макроекономских предности, на макроекономским предностима у виду смањења јавног дуга државе, утицаја на запосленост, усмеравање индивидуалне и групне штедње, фискалну политику, стопу раста БДП-а. Што се тиче трошкова, један од очигледних јесу предуговорне активности и истраживања које је неопходно да спроведе јавни сектор. Након тога, ту су и годишње надокнаде које јавни партнер исплаћује приватном, уколико су оне уговорене. У наставку су описани канали путем којих јавно-приватна партнерства врше шири утицај на националну економију. Објашњавају се четири канала: боља и квалитетнија инфраструктура; побољшање техничких и институционалних капацитета, транспарентности и организационих вештина; олакшана алокација јавних ресурса; могућност ЈПП да привуку приватну штедњу у дугорочне инвестиције. Представљена је и методологија коришћена у претходним истраживањима, као и неки емпиријски резултати. Последњи сегмент користи модел динамичког система да покаже како јавно-приватно партнерство утиче на макроекономске параметре. Приказане су друштвено-економске интеракције међу актерима система. По-

стоје јавни партнери као јавни органи, приватни партнери у облику инвеститора и запослених и порески обвезници, који представљају друштво. Модел динамике система састоји се од седам сектора: производња ЈПП-а, запосленост, капитал ЈПП-а, профитабилност, економски раст, становништво и јавни буџет.

Веза између инфраструктуре и економског раста постаје јача јер партнерски аранжмани утичу на квалитетније инфраструктурне услуге, боље одржавање и спровођење пројеката на време и у оквиру буџета. У раду су представљени неки канали преко којих ЈПП може да допринесе макроекономским параметрима у форми инфраструктурних пројеката или путем привлачења приватних инвестиција. За спровођење јавно-приватног партнерства неопходно је да јавни сектор ојача свој институционални капацитет, као и правни и регулаторни оквир. Једнако су важни и транспарентност и добро управљање. Сва ова побољшања могла би довести до тога да економије у развоју више улажу у друге јавне услуге које за кориснике имају сиромашне, нпр. социјална заштита или различите субвенције. Коришћењем ЈПП-а приватни сектор је у могућности да се укључи у постизање националних развојних циљева. Има потенцијал да привуче дугорочну штедњу и усмери је ка инфраструктурним пројектима дугог временског трајања. Адекватно спроведено јавно-приватно партнерство неминовно доводи до укупног побољшања и напретка, не само за локални развој и регионе већ и за целу националну економију.

Примарни циљ овог рада је да истакне макроекономску димензију јавно-приватног партнерства и детаљније представи канале утицаја, као и методологију за приступ ЈПП-у и његову употребу за побољшање раста и развоја националних економија. Даља истраживања биће усмерена на анализу стања ЈПП-а у Србији и у региону.



**ИСТОРИЈА**  
**HISTORY**



## ОКУПЉАЊЕ ЛИБЕРАЛА ПОД ВОЂСТВОМ ЈОВАНА РИСТИЋА ОД 1868. ДО 1873. ГОДИНЕ

Мирослав Пешић\*

Универзитет у Нишу, Филозофски факултет, Ниш, Србија

### Апстракт

У раду су приказани напори Намесништва, а нарочито Јована Ристића, да током четворогодишњег мандата, служећи се притом разним средствима, окупи што већи број либерала око себе. Већина либерала је прихватила намеснички режим, у нади да ће ублажити полицијско-бироџатски режим увођењем одређених реформи. Други намесник Јован Ристић је заједно са Блазнавцем, првим намесником, користећи све полуге власти, окупао око себе политичке присталице, не искључујући ни либерале са Светоандрејске скупштине, иако га они никада нису доживљавали као свог истомисленика. Упркос чињеници да је стајао уз Илију Гарашанина, противника либерала, Ристић је успео да се наметне као њихов предводник. Овај државник отпочео је владавину покретом либерала, а да сам није много веровао у идеје либерализма.

**Кључне речи:** Јован Ристић, либерали, Намесништво, Миливоје Петровић Блазнавац, Устав из 1869. године.

## THE GATHERING OF THE LIBERALS UNDER THE LEADERSHIP OF JOVAN RISTIC FROM 1868 TO 1873

### Abstract

This paper shows the efforts of the Governorship, and especially Jovan Ristic's efforts during the four-year mandate, to gather a large number of Liberals around him using various means. Most of the Liberals accepted the regime of the Governorship hoping that it would soften the political-bureaucratic regime by introducing certain reforms. The second governor, Jovan Ristic, together with the first one, Blaznavac, gathered political supporters around him using all levers of power, not even excluding the liberals of St. Andrea's assembly, even though they had never seen him as their political ally. Despite the fact that he stood with an enemy of the liberals, Ilija Garasanin, Ristic managed to impose himself as their leader. This statesman started

\* Аутор за кореспонденцију: Мирослав Пешић, Филозофски факултет у Нишу, Тирила и Методија 2, 18000 Ниш, Србија, [miroslav.pesic@filfak.ni.ac.rs](mailto:miroslav.pesic@filfak.ni.ac.rs)

the reign with the movement of liberals, although he did not believe in the ideas of liberalism himself.

**Key words:** Jovan Ristic, liberals, the governorship, Milivoje Petrovic Blaznavac, The Constitution of 1869.

### УВОД

После убиства кнеза Михаила Обреновића 10. јуна 1868. у Кошутњаку, образовано је привремено намесништво које су чинили Јован Мариновић и његов лични пријатељ Илија Гарашанин. Привремену владу образовао је Милан Петронијевић. Избор новог кнеза Милана Обреновића, који је допутовао у Београд 23. јуна 1868. године, требало је да обави Велика народна скупштина 2. јула 1868. Будући да га је војска Београдског гарнизона, предвођена министром војним Миливојем Блазнавцем, изабрала за наследног кнеза 12. јуна, Скупштина је питање попуњавања упражњеног престола решила тако што је утврдила наследно право Обреновића на престо. Том приликом су изабрани намесници малолетном владару: Миливоје Петровић Блазнавац, Јован Ристић и Јован Гавриловић. На тај начин, одлука Народног представништва била је прејудицирана, а Блазнавчева улога постала је „претежнија над значајним политичким личностима у земљи” (Рајић, 2015, стр. 67). Милан Обреновић је миропомазан у Саборној цркви у Београду 5. јула, а султанов берат којим је признат за српског кнеза с наследним правом прочитан је две недеље касније у двору. То је био последњи султанов берат издат српским владарима. Тиме је враћено право наследства престола према одредбама из 1830. године (Љушић, 2008, стр. 158). Као министар војни (1865–1868), Блазнавац је располагао кључном полугом власти у тренутку убиства кнеза Михаила. Војску је искористио да онемогући Илију Гарашанина, те да се војним ударом домогне власти и себе постави за кључног намесника. Две недеље после атентата у Топчидеру нико у земљи није помињао Илију Гарашанина као кандидата за намесника. Блазнавац је успео у својој намери да потисне свог бившег шефа иако је он као изузетно популарна личност у земљи испрва сматран за пожељног члана Намесништва. По свему судећи, Блазнавац је дошао у први план, јер је обећао аустријском конзулу Калају да ће радити на продубљивању пријатељских односа са Аустроугарском монархијом. У Бечу се сматрало да је Ристић пријатељ Блазнавца и да ће прихватити његову спољну политику. Јован Гавриловић, као трећа личност у Намесништву, готово да се и не помиње (Рајић, 2015, стр. 72–73). Руски конзул у Београду Шишкин био је незадовољан развојем догађаја, јер је пропао његов план да се за намеснике изабере Гарашанин и Јован Мариновић. Сматрао је да је Блазнавац преузео сву власт у своје руке, али је истицао да је потребно да се ради

на превазилажењу унутрашње напетости, коју би Аустрија могла искористити за привремену окупацију Кнежевине. Шишкин се питао да ли би било боље да Русија призна „диктатуру Блазнавца” ако би то довело до смиревања страсти у земљи. Он даље наводи:

„Ако Срби нису били способни да опросте кнезу Михаилу његове мање недостатке, који су се искупљивали његовим патриотизмом и великодушносту, ако су допустили да га убију као пса, нека буду кажњени за то самовлашћем и диктатуром Блазнавца. Они су то потпуно заслужили” (Леовац, 2015, стр. 293).

Када је изабран на место намесника, Ристић је имао 37 година, те се на том месту нашао пре многих других истакнутих политичара тога времена, који су у својим каријерама обављали много значајније државне функције. Будући да је био припадник млађе генерације политичара, да је иза себе имао значајније дипломатске успехе, те да је намеравао да спроведе извесне реформе, то је био довољан разлог да либерална интелигенција подржи Ристића. Подршка интелигенције утицала је на Блазнавца да за свог партнера у Намесништву узме Јована Ристића. Без обзира на то што је тек 1881. године након оснивања Народно-либералне странке формално постао вођа либерала, Јован Ристић се у пракси на тој позицији нашао 1868. године. За време Другог намесништва дошло је до процеса спајања умерених либерала и светоандрејаца и на тај начин су постављени темељи касније основане Либералне странке. Иако до краја нису били задовољни реформама које је донео Устав из 1869. године, чији је творац Јован Ристић и који је био у складу са његовом политиком умереног либерализма, либерали су се масовно окупљали око Ристића и Намесништва. У периоду другог намесништва, Ристићу се указала прилика да око себе окупи либералну интелигенцију и постане главни идеолог либерала. Свој положај вође међу либералима Јован Ристић је успео да још више учврсти током седамдесетих година 19. века (Радовић, 2013, стр. 205–206).

### *ЈОВАН РИСТИЋ И ЛИБЕРАЛИ ЗА ВРЕМЕ НАМЕСНИШТВА (1868–1872)*

Након Топчидерске катастрофе 1868. године, либерали су били упућени на сарадњу са намесничким режимом. Прво, он им је гарантовао заштиту од даљих прогона полиције, јер су били оптуживани да су учествовали у завери против владара; друго, пристао је да спроведе реформе. Јован Ристић, који је за време Светоандрејске скупштине 1858. године заступао умерени либерализам, сматрао је да је полицијско-бирокуратски режим кнеза Михаила постао толико непо-

пуларан да неће опстати уколико се не ублажи. Намеравао је да донесе нови устав, јер му је претходни из 1838. године сметао зато што је био конзервативан и наметнут од Турске. Неслагање са постојећом политиком кнеза Михаила обезбедило му је извесну популарност међу слободоумном интелигенцијом, иако га убеђени либерали Милован Јанковић, Владимир Јовановић и Јеврем Грујић нису доживљавали као свог истомишљеника (Бешлин, 2005, стр. 650). Почетком 60-их година 19. века учињен је први корак у правцу формирања новог језгра либерала. Радивоје Милојковић је женидбом са Милевом<sup>1</sup>, ћерком Хаџи Томе, постао пашеног Јовану Ристићу. После завршених студија вратио се у Србију 1859. године и приближио се светоандрејцима, посебно Јеврему Грујићу и Стевчи Михаиловићу. Светоандрејским либералима задат је велики ударац када је Милојковић прешао на Ристићеву страну, иако је он и даље говорио да припада њиховој политичкој опцији (Радовић, 2013, стр. 197). На политичкој сцени Србије, Ристић је доспео у први план после повратка из Цариграда, где се као српски дипломатски представник нарочито истакао у раду на добијању градова. После повратка у Београд саветовао је кнезу да изведе одређене реформе зарад смиривања унутрашње напетости у земљи. Предочио је кнезу да Србија не би смела да буде подељена, јер не поседује у довољној мери интелектуални капацитет, те да би због тога кнез требало да се окури интелигенцијом, која се налазила код Владимира Јовановића. Упоредо са тим, Ристић је напомињао да не жели да буде у истом министарству са конзервативцима – Рајком Лешјанином, Костом Цукићем и Николом Христићем. Уместо њих, предлагао је Радивоја Милојковића, Стевчу Михаиловића и Панту Јовановића. Од кнеза је захтевао да у Влади остане министар војни Миливоје Блазнавац. Чињеница да је Ристић предложио кнезу да Стевча Михаиловић образује владу, а не код либерала озлоглашени Никола Христић – оставила је веома повољан утисак код либералне опозиције. Ристић се тада први пут јавно сврстао уз либерале. У том тренутку либерална интелигенција је све више почела да гледа на Ристића као на свог предводника (Радовић, 2013, стр. 202–204).

Ристићу је била добро позната чињеница да је слободоумна интелигенција окупљена око либерала, који су били главни противници политике кнеза Михаила. Обећавајући увођење одређених реформи у земљу, намеравао је да умеренији део либерала привуче на

<sup>1</sup> „Те године у месецу септемвру 3. или 4. дана испросим кћер Хаџи Томе, трговца на Сави у Београду, по имену Милеву; и 22. октомбра те 1861. године венчам се с њом. Милева се родила, као што ми казива после таст, 1844. године у месецу септемвру, и тако је била у 18. године када смо се венчали” (Вулетић, Трговчевић, стр. 2003, 81–82).

своју страну. Иако су се прве партијске клице појавиле за време Светоандрејске скупштине 1858. године, када су се формирале две политичке групације – конзервативци и либерали, тек са намесничким режимом (1868–1872) отпочиње прави политичко-партијски живот у Србији. Доношењем Устава из 1869. године, који је делимично задовољио либерале, Ристић је вештим маневрисањем успео да већи део либерала веже за намеснички режим (Чубриловић, 1958, стр. 323–358). Један анонимни аутор, вероватно касније радикал, наводи „да су после 1868. године либералци из забуне и страха, изгубили базис свог становишта, напустили принцип своје опозиције и здружили се са властољубивим Блазнавцем и Ристићем да обману народ” (АС, ВЉ-3). Према мишљењу Јаше Продановића, Устав из 1869. године, чији је главни творац Јован Ристић, представљао је програм либерала окупљених око њега. По свему судећи, конзервативне и „умерљачке” погледе, који су доминирали у Уставу из 1869. године, Ристић никада није напустио. Он је говорио: „Ми смо елементи реда идући средином пута видимо и десно и лево поред себе само крајности, а крајностима никада не припада будућност. Либерализам подјемчава слободу с редом, а слобода је с редом неминовни услов друштвеног живота” (Рајић, 1999, стр. 42).

Уставом из 1869. године је у Србију уведен представнички систем, тј. овим уставом је Народна скупштина добила удео у законодавној власти. Скупштина је била састављена од изабраних народних посланика и оних које је кнез постављао. Устав је прописао обичну скупштину и Велику народну скупштину. Посланици су се бирали по варошима на непосредним изборима, а по срезовима на посредним изборима преко повереника. На свака три изабрана посланика кнез је имао право да постави по једног. За посланика је могао бити изабран онај ко је напунио тридесет година живота и ко је плаћао држави порез од најмање шест талира годишње на имање, рад или приход. Адвокати и чиновници нису могли бити народни, већ кнежеви посланици, док је војницима стајаће војске било забрањено да бирају и да буду бирани. Највиши правни акт није успоставио равнотежу снага између Народне скупштине и кнеза, као другог законодавног чиниоца, јер је омогућио кнезу надмоћнији положај у законодавној власти.

Законодавна иницијатива припала је кнезу, а не Народној скупштини. Скупштина је могла само да изјављује жеље да се одређени закон донесе или промени, док је кнез предлагао законе. Нови устав онемогућио је посланике да о закону расправљају у појединостима, тј. нису имали право подношења амандмана на предложени закон. Скупштина је морала или да прихвати или да одбаци предлог закона у целини. Кнез је могао да издаје привремене законе у случају да је безбедност земље доведена у питање и они су важили све док је трајало ванредно стање у

земљи. Систем избора који је завео Устав из 1869. године није давао довољно јемства за слободу избора, јер је гласање било јавно. Полиција је могла да се меша у изборе, нарочито по срезовима, где су се они вршили преко повереника (Јовановић, стр. 1990а, 29–30). Ако скупштина не би усвојила буџет за нову годину, влада је имала право да пренесе стари буџет за следећу годину. Дакле, буџетско право није припадало скупштини, већ влади. Нови устав је завео представнички систем без парламентарне владавине, јер министри нису били народни посланици и није постојала политичка одговорност министара, већ само кривична. Они нису одговарали скупштини, него кнезу (Љушић, 2010, стр. 96). Министре је постављао и отпуштао кнез, они су у ствари били људи од поверења кнеза, а не скупштине. Слободан Јовановић закључује да „политичка одговорност министара, која чини суштину парламентарног режима, није постојала по Уставу из 1869. године” (Јовановић, 1990б, стр. 74–75). Обавезно одржавање Скупштине и њено учешће у доношењу закона биле су главне тековине Устава из 1869. године. Околност да се Скупштина састајала сваке године, а избори за њу обављали сваке треће године – допринела је интензивирању политичког живота у земљи, стварајући услове да у Скупштину уђу напреднији слојеви друштва, посланици који су допринели јачању политичко-страначких борби у земљи (Јанковић, 1997, стр. 129). У Скупштини, која је по Уставу добила ограничену законодавну власт, посланици су се делили на владине присталице Ристића и Блазнавца, са једне стране, и опозиционе, који су били малобројни, са друге стране.<sup>2</sup>

Одређени број посланика није био задовољан владиним предлогом Устава. Тако је, на пример, посланик из Смедерева Мијаило Стајковац критиковао поједине одредбе Устава, истичући да овим уставом „не добија народ ништа”. Пошто Скупштина није добила право законодавне иницијативе, као ни искључиво буџетско право, Стајковац је захтевао да влада измени предлог Устава „којим ће се признати народу решавајући глас у потпуноме законодавству” (АСАНУ, ЈР, VI/4, бр. 48).

Намесничким уставом, који је био „скројен” у складу са Ристићевим либерализмом, нису били задовољни и истакнути либерали Јеврем Грујић, Владимир Јовановић, Алимпије Васиљевић, Стојан

<sup>2</sup> У својим *Успоменама* Аврам Петровић, дугогодишњи начелник Министарства привреде, сећајући се периода владавине намесника, записао је: „Дотле код нас нису постојале организоване партије. Постојале су само две групе две партије: једна владина, која се називала либералном и друга: опозициона, у коју су улазили сви опозиционери: конзервативци и сви слободнији људи од којих су неке називали комунцима, социјалистима, републиканцима. Тако је тада било и посланика који су дотле били само опозиционари а нису били опредељени шта су” (Петровић, 1988, стр. 89).



Бошковић и Милован Јанковић. За време избора за уставотворну скупштину, власт је чинила све не би ли онемогућила избор Јовановића и Јанковића. Успела је да спречи да Бошковић и Васиљевић буду изабрани за секретаре скупштине. Међутим, либерали нису били прогањани као у време владавине кнеза Михаила и донели су одлуку да сарађују са намесничким режимом. Без обзира на бројне недостатке, за њих је Устав донет у Србији без мешања Порте омогућавао већи степен развоја грађанских слобода него претходни. Истини за вољу, многи истакнути либерали руководили су се и личним разлозима када су одлучили да се одрекну многих ранијих захтева за либералнодемократски преображај земље. Због вишегодишње опозиције режиму, били су изложени разним врстама напада, а Намесништво им је давало значајне државне функције. Тако је, на пример, Димитрије Матић једно време био на челу Министарства спољних послова, а затим је постао министар просвете, посветивши се реформаторском раду у области образовања. Либерали се поново окупљају око Српског ученог друштва, из кога су уклоњени за време режима кнеза Михаила. Јеврем Грујић се почетком 1869. године обратио Радивоју Милојковићу да му помогне да се врати у државну службу. Милојковић, који је био у добрим односима са Јованом Ристићем, помогао је Грујићу и он је постављен за посланика у Цариграду. Стојан Бошковић је постао секретар Министарства спољних послова, Јован Илић је заузео ресор Министарства правде. Место предавача Филозофије и Логике на Великој школи добио је Алимпије Васиљевић. Убрзо је постао редовни професор (Бешлин, 2005, стр. 662–663).

За време кнеза Михаила, либерали су били искључиви, тј. тражили су све или ништа, док су за време Намесништва дошли на идеју „да је бољи и умерени либерализам намеснички него никакав либерализам” (Јовановић, 1990б, стр. 132). Ристић је вође светоандрејца, међу којима су се посебно истицали Јеврем Грујић и Милован Јанковић, више доживљавао као конкуренте, а мање као политичке противнике. За разлику од њих, Ристић је захваљујући родбинским везама успео да напредује у државној служби. Потребно је указати на чињеницу да су они припадали истој генерацији, коју су образовали исти догађаји и која је имала сличан пут развоја. Као припадници *Дружине младежи српске*, присуствовали су Мајској скупштини 1848. године, на којој је проглашена српска Војводина, образовали се на истим универзитетским центрима. Анализирајући два Ристићева списа из тог периода – *Законитост и Реформе у Србији*, долазимо до закључка да је делио исте идеја као и светоандрејски либерали. Истицао је да је неопходно уредити Народну скупштину, увести министарску одговорност, слободу штампе, независност и непокретност судија (Радовић, 2013, стр. 197–198). Његове критике старих политичких установа Србије, које је створио Устав из 1838. године,

у практичном смислу речи су још тада отвориле уставно питање, иако је оно дошло на ред тек 1869. године (Симеуновић, 2003, стр. 229). У чему се онда састојала разлика између њих? Разлику треба потражити у мери и времену, односно „у апликацији начела. Између великих и умерених либералаца зближење је природно, јер им је начелна цель једна, а само их раздвајају мера и време у апликацији начела” (*Полемика Јована Ристића и српских конзервативаца 1877. године*, Приредио Чедомир Попов, Београд 1997. стр. 202). Светоандрејским либералима је Ристић замерао „демократску тиранију”, сматрајући да њихова начела нису у складу са тадашњим степеном друштвеног развитака. С друге стране, одао им је признање за успостављање народног представништва као сталног органа власти. Ристићева политика „умереног корачања” сврстала је овог политичара у табор умереног либерализма. Без обзира на то што је био близак Илији Гарашанину, Ристић је на време схватио захтеве које је наметнуло ново доба „и за кога ради време” (Радовић, 2013, стр. 198). Као основ своје политике, Ристић је истицао правац „корак по корак”, док је Преображенску скупштину видео као основу за даљу изградњу тих начела.<sup>3</sup> За разлику од светоандрејаца, чији је либерализам био „демократски обојен”, Ристић је имао одбојан став према упливу народних маса у политику, нагињући ка умереном либерализму, што га је „дуго година зближавало са конзервативном странком” (Бешлин, 2005, стр. 299). Био је присталица и творац умерених реформи које подстиче власт, а не маса. Једном приликом је кнезу Михаилу рекао:

„Ми смо на путу који ће реформе собом довести, па је мудрије да их сами дамо, но да нам оне буду силом отете; ако оне пођу одозго[,] биће плодне и спасоносне за земљу, пођу ли одоздо[,] оне могу прећи у неред и потрес, који не зна се где се може зауставити” (Симеуновић, 2003, стр. 230).

У својој политичкој каријери, Јован Ристић је зачетке Либералне странке везивао за 1848. годину, а његови истомишљеници су у неколико наврата узимали Светоандрејску скупштину 1858. године као време настанка Либералне странке. Ни једна ни друга година не могу се узети као године настанка Либералне странке, јер је 1848. године малобројна група интелектуалаца изнела своје либералне захте-

<sup>3</sup> „Развитак људски тешко погађа средину, он је срећан, ако себи није затворио пут даљем кретању. У ову погрешку пре пада наглост, којој је тешко вратити се к средини, но разложност, којој остаје свагда слободан пут да к њој коракне, ако је заостала. Овај карактер умерености носи неоспорно рад Преображенске скупштине. Ако он у духу либерализма, и није задовољио захтевања свију ватрених патриота, он ни мало није затворио пут поправци и даљем развитуку, који ће у толико јачи и позданији бити, у колико се брижљивије и смотреније примицао последњим оградама слободе” (Ристић, 1887, стр. 84).

ве, а 1858. године се једна бројнија група залагала за остварење либералног и националног програма. Зачетке Либералне странке на челу са Јованом Ристићем налазимо за време Намесништва 1868–1872. године. Ову странку Ристић је у неколико наврата називао „умерено либерална или као што се радо звала, напредњачка”. Да не би дошло до забуне, ваља напоменути да то није била савремена политичка странка, јер формално није имала ни програм, а ни организацију. Без обзира на то што није постојао писани програм, он се могао видети из више изјава Јована Ристића, нарочито када се имају у виду „Ристићеве замисли уређења Србије у његовом нацрту Уставу из 1869. године” (Јанковић, 1997, стр. 152–153).

Пре усвајања Устава из 1869. године, Ристић је имао свој нацрт Устава. По том нацрту, предвиђао се дводомни систем народног представништва: Народна скупштина и Земаљски савет. Народна скупштина се бирала на три године, с тим што је било прописано да сваке године испадне по једна трећина посланика чија су се места попуњавала накнадним изборима. Скупштина је бирала четири уместо шест кандидата за председништво, од којих је кнез једног постављао за председника, а једног за потпредседника. Земаљски савет, који је по нацрту бројао између 40 и 50 чланова, састојао се из вирилних и постављених чланова. Овај нацрт је омогућавао чиновницима право да се кандидују за посланике, ако су имали десет година државне службе и нису били војници. Устав из 1869. године, као што је речено, није усвојио дводомно, већ једнодомно народно представништво. Ристићев нацрт Устава није поднет Великој народној скупштини. Намесници су осетили да ће установа Земаљског савета поред Народне скупштине изазвати негодовање народних маса и зато су одустали од установе Земаљског савета, али су уместо ње предвидели кнежеве посланике, тј. обавезно именоване трећине посланика од стране кнеза. Устав из 1869. године забранио је чиновницима да се кандидују за народне посланике, док је по Ристићевом нацрту и чиновник могао бити народни посланик (Продановић, 1947, стр. 314–317).

Уставни нацрт Јована Ристића донекле може илустровати његов став према политичким реформама и политичким променама. Ристић је политичке реформе доживљавао као средство за очување власти, које треба примењивати само у крајњој нужди „без задирања у корените промене” (Јовановић, 1990б, стр. 83–84). Миливоје Петровић Блазнавац у разговору са Николом Крстићем је признао да је влада хтела да се игра с либерализмом. Либерализам владе је називао чистим „комедијашењем”. Блазнавац је Народну скупштину створену по Уставу из 1869. године називао „илузијом, институтом фантазије” (Крстић, 2006, стр. 165). Међутим, док се Блазнавац није много разумео у политички живот земље, јер је по струци био официр,

Ристић је са својим умереним либерализмом постао политички вођа намесничког режима.

Оцењујући политичке ставове Блазнавца за време Намесништва, Никола Крстић је навео следеће: „Поставши намесник приста и он да се заведе слободне установе, али без слободе” (Крстић, 2006, стр. 198). Одржавао је контакте и са опозицијом у намери да се покаже као пријатељ и једних и других, тј. оних политичара који су били на власти за време кнеза Михаила и напредне школоване интелигенције, која је сматрала да је влада Намесништва и сувише конзервативна. Милан Пироћанац наводи да је младоконзервативним политичарима Блазнавац предлагао да уђу у будућу намесничку владу, јер је требало прекинути „са дотадашњим правцем и ослонити се на млађе и способне елементе”. Међутим, због упорног инсистирања Блазнавца да у Намесништво уђе Јован Ристић, а у Министарство унутрашњих дела Радивоје Милојковић, младоконзервативци су одбили позив Миливоја Блазнавца (Пироћанац, 1896, стр. 16). Међутим, у разговору са Бењамином Калајем, аустријским конзулом у Србији, Блазнавац је рекао да неће одустати од планираних реформи, иако ће због тога највероватније бити критикован. За Јована Ристића је говорио да је сигуран да ће водити исту политику као и он и да га је због тога узео у Намесништво.<sup>4</sup>

Прву Владу за време Намесништва образовао је Ђорђе Д. Ценић 3. јула 1868. године. Осим председника, ова влада је имала три министра, при чему је сваки од њих држао по два ресора. Да је влада била под јаким утицајем намесничког режима – сведочи чињеница „да је од 32 министарске седнице, колико је одржала ова влада, 31 одржана под председништвом намесника”. Осим председника Владе и министра правде Ђорђа Ценића, који је био конзервативац, остали чланови владе (Радивоје Милојковић, Панта Јовановић, Јован Белимарковић) били су либерали или, боље речено, присталице Јована Ристића, осим донекле Белимарковића, који је сматран за светоандрејског либерала. Ово показује да су се многи либерали одрекли својих идеја како би се додворили намесничком режиму и заузели високе положаје у држави. Ристић намерно није попуњавало све министарске ресоре да би држао у неизвесности светоандрејске либерале и конзервативце, тј. да би му та непопуњена министарска места послужила као мамац за неке политичке актере до којих му је било

<sup>4</sup> Поставши намесник, Блазнавац је, за разлику од староконзервативаца, имао намеру да помоћу Јована Ристића придобије интелигенцију на страну Намесништва обећавајући увођење либералних реформи у Кнежевину Србији (Калај, 1976, стр. 57).

стало.<sup>5</sup> Тако је 6. октобра 1868. у владу позвао либерала Димитрија Матића, који је заузео ресор Министарства просвете и црквених дела, док је Стојан Бошковић постао секретар Министарства иностраних послова. Убрзо након доношења Устава, образована је Влада Радивоја Милојковића 29. јула 1869. године. Поред Милојковића, остала су и три министра из претходног сазива, с тим што су извесно време министарске функције обављали и Јован Илић и Стојан Вељковић (Јанковић, 1997, стр. 154).

Без обзира на то што Либерална странка за време Намесништва није формално била организована као политичка странка, Јован Ристић је водио рачуна о одржавању партијске дисциплине, тј. слепе послушности својих присталица.<sup>6</sup> На изборима за редовну Народну скупштину за период од 1871. до 1873. године главну улогу је одиграла полиција Радивоја Милојковића. Већину су добили либерали. Слободан Јовановић наводи да су „батине ударане без много ислеђивања и утврђивања кривице” за време министровања Радивоја Милојковића. „Прво га цепни па му онда тражи параграф!” (Јовановић, 1990б, стр. 94).

Седамдесетих година 19. века, Ристић је несумњиво најјача политичка личност у Кнежевини Србији. Успео је да наметне своје идеје о јакој влади, тј. да министри што мање зависе од Скупштине (Љушић, 2010, стр. 97). За време Намесништва, Ристић је улагао велике напоре, користио разна средства да би образовао своју, односно владину, странку, која се називала либерална. Очување династије Обреновић послужило је намесницима као изговор да сузбију опозициони покрет у земљи и да придобију политичке противнике за своју либералну групацију. Иако није било велики заговорник идеја либерализма, Ристић је успео да окупи око себе велики број либерала, који су постали покорни чиновници. Тако је, на пример, Владимир Јовановић један од водећих идеолога либералног покрета у Србији постао покорни чиновник под командом Јована Ристића. Намесник

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<sup>5</sup> Слободанка Стојичић наводи да је сасвим „извесно да су се позивали у владу само најпоузданији људи; уступци се нису чинили да би се владе комплетирале. Непопуњеност министарских места је давала наде виђенијим политичарима да ће бити постављени, а то им је диктирало бар за извесно време одрицање од идеја и програма које су пропагирани, а који се нису уклапали у нову уставност коју је Намесништво спроводило” (Стојичић, 1980, стр. 39).

<sup>6</sup> Јован Авакумовић у својим *Мемоарима* наводи да га је једном приликом изгдио Јован Ристић, због тога што је приликом избора за Велику народну скупштину јуна 1869. године гласао за опозиционог посланика Милована Јанковића. „То се, рекао ми је, не слаже ни са вашим положајем секретара и повереника Радивојева, ни са дужношћу нашег пријатеља уопште. Према нашим пријатељима ви сте дужни показивати више оданости и нераздвојне везе, практичним радом и јавним поступцима” (Авакумовић, 2008, стр. 129).

Ристић се веома добро сналазио у гломазној државној управи, јер је своју каријеру започео у полицијској струци. Политичка групација коју је Ристић окупио била је састављена од његових „личних поклоника и клијената”. Дакле, државом је управљао пар намесника уз велику помоћ министра унутрашњих дела, док су сви остали били обични послушници (Јовановић, 2012, стр. 113–114).

Штампа је била изузетно погодно средство којим су се намесници користили да би учврстили своју власт и спречили деловање ојачале опозиције. У званичним или полузваничним новинама, Намесништво се хвалило и увеличавало своје успехе, док је опозиционе листове цензурирало, привремено обустављало или их гасило. Да је Ристић био против потпуне слободе штампе потврђује одбијање владе да прихвати један веома слободоуман предлог закона, који је објављен у *Застави* Светозара Милетића. Овим предлогом, под називом *Основа закона о слободи пресе*, било је предвиђено да се листови могу издавати без одобрења надлежне власти, као и укидање свих облика цензуре. Као што је речено, влада је одбила овај предлог, јер је био исувише либералан (Вулић, 2010, стр. 451). Неопходно је поменути и да је ректор Велике школе Јосиф Панчић био против доношења закона о штампи. Своје неслагање са доношењем закона о штампи образложио је на следећи начин:

„да је овај закон доста, а може бити за нас и превише либералан прво стога што смо ми доста млад и неискусан народ, који се у бујности својој лако на странпутице навести даје, а ово је за нас доста опасно, зато што немамо још потпуне самосталности, те морамо према иностранству у сва чему смотрено да се владамо...” (АСАНУ, ЈР, VI/4, бр. 49).

У време Намесништва основан је посебан фонд за финансирање политичке пропаганде којим је руководио Јован Ристић. Финансирање пропаганде се обављало преко Министарства иностраних дела из фонда за „достојније заступање државних интереса”. Из овог фонда исплаћивање су дотације *Јединству*, финансиран је Прес-биро и исплаћивани разни други трошкови пропаганде (Бјелица, 1972, стр. 152). Непослушне чиновнике намесници су пензионисали, неке од њих предавали суду, док су својим присталицама обећавали, односно давали, места у државној служби. Јован Ристић је преко поверљивог Радивоја Милојковића успео да ојача утицај на полицијско чиновништво, иако непосредно није управљао полицијом. Министарство унутрашњих дела, на челу са Радивојем Милојковићем, било је од велике важности, јер је руководило унутрашњом управом земље, контролисало гласила и јавне иступе. Имајући у виду да је гласање по Уставу из 1869. године било јавно, полиција је држала у шапи и народне посланике, јер се директно мешала у изборни про-

пес (Јовановић, 2012, стр. 112). Димитрије Маринковић у својим *Успоменама* наводи да је Намесништво пензионисало велики број чиновника у полицијској служби, а на њихова места постављало своје присталице. Ова појава је за последицу имала стварање партијског чиновништва, тј. чиновници су се опредељивали за владу или против ње. За време Намесништва створена је велика мрежа шпијуна, а све под изговором очувања династије Обреновић, после велике катастрофе у Кошутњаку. Блазнавац и Ристић, пошто су се већ истакли као спасиоци династије Обреновић, гледали су на све начине да придобију старе Обреновићевце нудећи им државне функције (на пример Стевчи Михаиловићу, кога нису узели у Намесништво, али су му дали функцију староаца имања малолетног кнеза Милана (Маринковић, 1939, стр. 211–215).

Милан С. Пироћанац је тврдио да му је један од намесника у великом заносу говорио: „Ми се не обазиремо: ни на способност ни на карактер у овој држави има места само за наше пријатеље”, док је његов министар унутрашњих послова Радивоје Милојковић, како наводи Пироћанац, „ову државничку мудрост преводио на овај разумљивији језик”: „Ко је с нама учинићемо све за њега што можемо. Ко је неутралан нема се од нас ничему надати. Ко је против нас, њега ћемо секиром по глави” (Пироћанац, 1895, стр. 6).

Политичка моћ намесника, а посебно Јована Ристића, почела је лагано да слаби доласком на власт кнеза Милана Обреновића 22. августа 1872. године. Истог дана када је постао пунолетан, изашла је прокламација у којој кнез Милан захваљује свом народу, народним посланицима, војсци, чиновницима, а посебно Намесништву. Намесништво је поднело кнезу *Извештај о стању Србије* од 12. јула 1868. до 22. августа 1872. године. Извештај је обухватао следеће одељке: о утврђивању унутрашњих односа после катастрофе из 1868. године, о унапређењу просвете; подизању народне економије, о правосуђу, о општим мерама за одржање здравља, живота и имовине од опасних људи и елемената, о одбрамбеној моћи земље; о предузетим активностима у спољној политици. Готово у свим областима друштвеног живота земље хвалио се рад владе Намесништва (*Српске новине*, бр. 95, 22. август 1872. године; Продановић, 1947, стр. 346).

Према бившим намесницима, нарочито према Ристићу, кнез Милан био је крајње неповерљив. Блазнавца није волео, јер је у њему видео свог супарника због његових претензија на престо, док је према Ристићу осећао одвратност (Јовановић, 1990б, стр. 159). Без обзира на то што је мрзео обојицу бивших намесника, кнез Милан је био толико интелигентан да их се није одмах ослободио, него је чекао погодну прилику за то, док се мало не учврсти на престолу (Јанковић, 1997, стр. 165). Убрзо по преузимању власти, кнез Милан се изјашњавао против Устава из 1869. године, који је донет за време

његовог малолетства. Разлоге за ово противљење свакако треба тражити у његовој тежњи за апсолутном влашћу. Без обзира на то што су га намесници одржали на власти, он је био киван на њих, јер му нису књажевску власт сачували „у исто онако великом обиму у којем ју је имао кнез Михаило”. Кнез Милан је делио мишљење конзервативаца да је уставна промена из 1869. године велика политичка грешка. У њему је лагано почела да сазрева мисао да су конзервативци, а не намесници, прави стубови јаке владареве власти (Јовановић, 1990б, стр. 160). Да је кнез Милан у најмању руку био крајње неповерљив према намесницима сведочи и Стојан Новаковић. Он наводи да му је кнез Милан једном приликом рекао да је намеравао да ухапси намеснике (Миливоја Блазнавца, Јована Ристића и Јована Гавриловића) и да објави да по „уставним законима кнеза Михаила од 1861. године” Намесништво није имало право да промени Устав за време малолетства кнеза (Новаковић, 1908, стр. 2).

Прва скупштина сазвана након пунолетства кнеза Милана Обреновића састала се 6. октобра 1872. године у Крагујевцу. Скупштина је отворена престоном беседом 7. октобра 1872. године. Кнез је захвалио посланицима на дотадашњем раду и напоменуо да се само заједничким снагама могу решити сложени државни проблеми (*Српске новине*, бр. 113, 3. октобар 1872. године). Скупштина је одговорила адресом која је, у ствари, парафразирала беседу. Љубомир Каљевић је, заједно са петорицом посланика, предложио да адреса не би требало да садржи само одговор на садржај престоног беседе, већ да у њој треба да се истичу најзначајније жеље Народног представништва. Ова група посланика предложила је да се у адреси убудуће износе жеље народа да се поправи уређење општина, да се успоставе окружне скупштине које ће се, осим политичких, бавити и економским потребама локалних средина. Такође се тражило издавање царинских тарифа, закона о радњама и уређење администрације. Јован Бошковић је навео да у адреси треба да кажемо „шта нама треба”. Скупштина је затворена указом 6. новембра 1872. године.

Иако су Ристићеви либерали све до 3. новембра 1873. године задржали власт, апсолутна моћ Јована Ристића почела је да слаби. У одбору за адресу на почетку скупштинског заседања 1872. године појавила се опозиција влади (Љ. Каљевић, К. Великић, А. Лукић, Ј. Бошковић, А. Николајевић и К. Стошић) (*Протоколи Народне скупштине држане у Крагујевцу 1872. године, Београд 1873*, 25). Они су, као што је речено, тражили да се поправи *Закон о устројству општина*, да се изда закон о радњама, уреди администрација итд. За време своје владе Блазнавац се припремао да прекине са Ристићем и његовим либералима. Имао је план да се врати конзервативцима, с којима је био за време владавине кнеза Михаила Обреновића. Јован Ристић је навео да је „Блазнавац последњих дана свога живота при-



уготовљавао за људе из Гарашанинове партије, а одвраћао од људи 1858. год.” (Живановић, 1923, стр. 247). Међутим, то се није десило због изненадне смрти Миливоја Блазнавца 5. априла 1873. године. Кнез је био у дилеми кога да изабере за наследника Миливоја Петровића Блазнавца. Тада су постојале три политичке групације: стари либерали – Светоандрејски из 1858. године (Стевча Михаиловић, Јеврем Грујић, Милован Јанковић и др.), конзервативци (Гарашанин, Јован Мариновић и др.) и новолиберали, тј. Ристићеви либерали. Кнез није хтео светоандрејске либерале, јер су били сувише слободомни, а неки од њих сматрани су републиканцима (Јанковић, Владимир Јовановић). Највише се колебао између конзервативаца и новолиберала. Више је волео конзервативце или барем коалицију између њих и новолиберала (Продановић, 1947, стр. 349). Међутим, до тога није дошло, па је кнез понудио Мариновићу да састави владу. Мариновић је то одбио.

Одбијање да састави владу Мариновић је правдао следећим разлозима: плашио се да не дође до опозиције његовој влади и сумњао је да може да побољша стање у земљи.<sup>7</sup> Гарашанин је наговарао Мариновића да се прихвати да састави владу. Он је писао Мариновићу 15. априла 1873. године да је боље да се прихвати министарства, јер би се држава уредила према нашим приликама, а не да се из иностранства доносе форме којима се ништа не може поправити (*Писма Илије Гарашанина Јовану Мариновићу од 4. јануара 1859. до 29. марта 1874. године, књ. 2.* Приредио Стеван Ловчевић. Београд 1931, стр. 321). У кабинету који је Ристић образовао 14. априла 1873. године није било ни Радивоја Милојковића, а ни Јована Белимарковића. Оваквим саставом Владе, који му је такорећи наметнуо кнез Милан Обреновић, Ристић није био задовољан. Допустио је да се кнез меша у састав Владе, што је за последицу имало јачање кнежеве жеље за личним режимом (Продановић, 1947, стр. 350). Ристићеви либерали су стално истицали да се њихова идеологија није променила после 1872. године, ни када су били на власти, ни у опозицији. Непрестано су потенцирали да су наводно први и главни представници либералних, али увек умерених, реформи у Србији.<sup>8</sup> Међутим,

<sup>7</sup> У писму Јовану Мариновићу поводом његовог одбијања да састави владу, Гарашанин је написао: „Истина је оно што си књазу казао да би опозиције било твом Министарству, но кажи ти мени хоће ли књаз бити у стању да створи једно Министарство, које неће опозиције имати; па лакше је на сваки начин трпети опозицију Министарству, кад је оно из најбољих људи састављено него из свакојаких” (*Писма Илије Гарашанина Јовану Мариновићу од 4. јануара 1859. до 29. марта 1874. године, књ. 2.* Приредио Стеван Ловчевић. Београд 1931, стр. 319).

<sup>8</sup> У Народној скупштини из 1879/1880. године, Јован Ристић је по ко зна који пут истицао предности вођења умерене политике. „Крајности нису никада путеви слободе, умереност је пут, који слободу води, умереност је штит, који слободу

опозиција је била крајње неповерљива према свим либералним владама, а нарочито је нападала Јована Ристића. Због његових карактерних особина, а посебно због његовог владалачког држања, био је на мети тешких напада од стране опозиције. Влада Јована Ристића није дочекала скупштину сазвану за 27. новембар 1873. године. Кнез Милан је изнудио оставку Владе Јована Ристића 3. новембра 1873. године. У јавности је оставка Владе представљена поремећеним здрављем Јована Ристића (Продановић, 1947, стр. 351). Кнез Милан је упутио ласкаво писмо Ристићу у коме наводно жали што је био принуђен да га отпусти због слабог здравља „захваљује му на патриотским услугама и изјављује надаље да ће му свагда саветом бити у помоћи, кад год га буде за савет питао” (Крстић, 2006, стр. 208). Мотиве Ристићевог пада с власти треба тражити у његовој властољубивости коју нису могли да поднесу не само његови министри него ни кнез Милан Обреновић. Ристић је са министрима поступао као са млађим чиновницима; они су му редовно реферисали о свом раду, а он им је издавао упутства (Јовановић, 1990б, стр. 166). Ристићеве методе застрашивања и поткупљивања људи државном службом најбоље се огледају на примеру Владимира Јовановића. Уморан од сталних прогона због својих либералних схватања, Јовановић је одлучио да затражи државну службу. Добио је место секретара у Министарству унутрашњих дела. Ристић се на тај начин ослободио опасног политичког противника.<sup>9</sup> Ристић није имао шта да тражи у ситуацији када министри које је поставио нису могли да поднесу његова понижавања, а кнез Милан његову надменост и охолост. Поднео је оставку, као што је наведено, 3. новембра 1873. године (Јовановић, 1990б, стр. 166–168).

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ду чува. Ја нисам никада у моме веку налазио за добро да будем друг крајности и бујности, ишао сам свагда средњим путем, и мислим да сам слободи ове земље привредио више но они, који су ишли путем крајности” (*Стенографске белешке о седницама Народне скупштине која је држана у Нишу 1879. и 1880*, II део, Београд 1880, стр. 1472).

<sup>9</sup> Ристић је у писму Филипу Христићу то овако објаснио: „Пређе је он (Владимир Јовановић) независан човек па нам је правило често незгода, а сад дошавши у одношаје службене мораће стајати под дисциплином чиновничком, ако не жели да изгуди свој комад. Он се на то и обавезао. Његов радикализам неће ни мало опасан бити у поштанској администрацији, у којој је службу добио; напротив, он је и ту себи руке везао државном службом” (*Писма Јована Ристића Филипу Христићу од 1870. до 1873. и од 1877. до 1880. године*, Зборник за историју, језик српског народа, књ. 20, Београд 1931, стр. 234).

### ЗАКЉУЧАК

За време малолетства кнеза Милана Обреновића (1868–1872), намеснички режим успео је да придобије већину либерала и да им повери неке задатке везане за доношење новог устава. Обећавајући увођење одређених реформи у земљу, Ристић је вештим маневром успео да умеренији део либерала привуче на своју страну. Иако су се прве партијске клице појавиле за време Светоандрејске скупштине 1858. године, када су се коначно искристалисале две политичке групе – конзервативци и либерали, тек са Намесничким режимом отпочео је прави политичко-партијски живот у Србији. За време Светоандрејске скупштине 1858. године, Ристић је заступао умерени либерализам, јер је сматрао да је полицијско-бирокуратски режим кнеза Михаила Обреновића постао толико непопуларан да га само одређене реформе могу спасити. Неслагање са постојећом политиком режима кнеза Михаила Ристићу је обезбедило популарност међу либералном интелигенцијом, без обзира на то што га убеђени либерали Јеврем Грујић, Владимир Јовановић и Милован Јанковић никада нису доживљавали као свог истомишљеника. Када је у питању Либерална странка, ваља указати на разлику између либерала са Светоандрејске скупштине и оних који су се за време Намесништва окупили под вођством Јована Ристића. Светоандрејски либерали нису представљали основу касније основане Либералне странке, на челу са Ристићем, чије зачетке налазимо тек за време Намесништва 1868–1872. године.

**Захвалница:** Рад је настао као резултат истраживања на пројекту Министарства просвете, науке и технолошког развоја Републике Србије *Модернизација западног Балкана (бр. 177009)*.

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Архив Српске академије наука и уметности – лични фонд Јована Ристића (АСАНУ, ЈР, VI/4, br.48-49) [Archives of the Serbian Academy of Sciences and Arts, Personal fund of Jovan Ristic, No.48-49].

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## **THE GATHERING OF THE LIBERALS UNDER THE LEADERSHIP OF JOVAN RISTIC FROM 1868 TO 1873**

**Miroslav Pešić**

University of Niš, Faculty of Philosophy, Niš, Serbia

### **Summary**

During the juvenile age of prince Milan Obrenovic (1868-1872), the Governorship regime managed to win most of the liberals and to entrust them certain missions related to the adoption of the new Constitution. By promising to introduce certain reforms in the country, Ristic managed to attract the more moderate part of the liberals to his side with a skillful maneuver. Although the first germs of parties appeared during the St. Andrea's assembly in 1858, when two political groups, conservatives and liberals, finally crystallized, it was only with the Governorship regime that the true political-party life in Serbia started. During the St. Andrea's assembly in 1858, Ristic supported a more moderate liberalism because he considered that the police-bureaucratic regime of Prince Mihailo Obrenovic became so unpopular that only certain reforms could save it. The disagreement with the existing politics of Prince Mihailo's regime secured Ristic the popularity among liberal intelligence, regardless of the fact that the convinced liberals such as Jevrem Grujic, Vladimir Jovanovic and Milovan Jankovic never saw him as a like-minded person. When it comes to the Liberal party, a difference between liberals from St. Andrea's assembly and those who gathered under the leadership of Jovan Ristic during the Governorship should be pointed out. St. Andrea's liberals did not represent the base of the later founded Liberal party led by Ristic whose beginnings we find during the Governorship from 1868 to 1872.

**ПРИКАЗ КЊИГЕ**  
**BOOK REVIEW**





## МАГА МАГАЗИНОВИЋ: МОДЕРНА ИГРА УМЕСТО ДОКТОРАТА ИЗ ФИЛОЗОФИЈЕ<sup>а</sup>

Јована Марчета\*

Универзитет у Новом Саду, Филозофски факултет, Нови Сад, Србија

Монографија *Мага Магазиновић: Модерна игра уместо доктората из филозофије* представља плод вишегодишњег интердисциплинарног истраживања др Vere Обрадовић, редовне професорке Универзитета у Приштини, са привременим седиштем у Косовској Митровици. Како би читаоцима дочарала сву комплексност личности Маге Магазиновић, ауторка је приказала ову врсну уметницу као „вишеструку” појаву чија енергија и деловање немају временски оквир. Ипак, Магин живот је у овој књизи стављен у друштвено-историјски оквир како би се њена неисцрпна борба за женску самосвест сагледала у укупности културних околности у Србији с почетка двадесетог века.

Мага Магазиновић је модерну игру видела као медијум за транспоноване савремених, европских ставова кроз националне мотиве. Њено свеобухватно познавање различитих домена игре понирало је у националну игру извлачећи из ње чист израз кореографског исказивања. Изградњи аутентичности Магиног кореографског стваралаштва допринеле су личности са којима се њен живот у једном тренутку преплитао и чији ставови су утицали на формирање њеног уметничког стваралаштва, без обзира на то да ли су се њена мишљења надовезивала на њихова мишљења или сукобљавала са њиховим мишљењима.

Ауторка у књизи издваја два културна круга – српски (београдски) и европски, чији пресек представља управо Мага Магазиновић. С једне стране, Мага Србију упознаје са европским токовима модерне игре, док с друге стране Европи приближава богатство српске националне играчке традиције. По личном нахођењу, Вера Обрадовић нас упознаје са личностима и стваралаштвима Бранка Поповића, Бранислава Петронијевића, Ксеније Атанасијевић, Надежде Петровић, Вићентија Ракића, Јубице и Данице Јанковић, Велимира Рајића и Владимира Станимировића (стр. 28–36) представљајући

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<sup>а</sup> Вера Обрадовић Љубинковић, *Мага Магазиновић: Модерна игра уместо доктората из филозофије*, Факултет уметности Универзитета у Приштини, Звечан – Косовска Митровица, 2019, 360.

\* Аутор за кореспонденцију: Јована Марчета, Универзитет у Новом Саду, Филозофски факултет, Др Зорана Ђинђића 2, 21102 Нови Сад, Србија, [jovanamarчета@gmail.com](mailto:jovanamarчета@gmail.com)

читаоцима ове важне личности, које су својим прогресивним идејама и деловањем утицале на свест српског друштва и допринеле укупности његове еманципације и модернизације. Као важну прекретницу у Магином животу, ауторка издваја 1907. годину и сусрет са контроверзном канадском играчицом Мод Алан (стр. 37–40). Управо овај први сусрет са новим правцем модерне игре утицао је на то да се Мага отисне ка европским авангардним школама у потрази за новим знањима.

У поглављу о европском културном кругу (стр. 41–46), Вера Обрадовић пише о Магином одласку на школовање у иностранство, као и о њеном повратку из Немачке, када је уместо доктората из филозофије у Србију донела модерну игру. Управо овај обрт представља окосницу ауторкине монографије, по којој је и добила назив. Мага Магазиновић није испунила очекивања. Ставила је уметност испред науке. Разлоге због којих се ова српска Исидора Данкан одлучила на тај корак можемо пронаћи у чињеници да је уметност сматрала најмоћнијим оружјем помоћу којег може да оствари своје циљеве. Своја сазнања из области играчке писмености стечене у европском окружењу, Мага оживљава у маловарошком духу средине и народа којима припада. Користећи играчку уметност као оруђе, она уздиже самосвест жена, на чије се образовање у Србији почетком XX века није много полагало. С друге стране, упознајући свог супруга Герхарда Геземана са српском епском књижевношћу, она покушава да избрише погрешна учебења западног света о српском народу и да Европи прикаже специфичности и лепоту српског културног идентитета. Мага кроз темеље модерне игре делује двојачко – бори се за деконструисање кодова који су ограничавали испољавање женског изражавања и за трансформацију обезличене женске маргиналности, истовремено представљајући Европи и свету сву лепоту српске фолклорне игре и целокупног југословенског културног наслеђа.

Магин кореографски израз, њена педагогија и однос према уметничкој игри прожети су идеологијама Макса Рајнхарта, Исидоре Данкан, Жака Далкроза, Рудолфа Лабана. Међутим, критичког и слободног духа, ова врсна уметница није априори и дословно преузимала и уносила њихове спознаје и ставове у своју концепцију игре. Напротив, стечено теоријско и искуствено богатство Мага интегрише у властиту идеологију подређену средини и културно-историјским потребама српског друштва, које је, за разлику од Европе, захваљујући њеним модернистичким и реформаторским настојањима, уместо класичне игре прво упознало неспутану, социјално и политички ангажовану модерну игру.

Женско тело у кореографијама Маге Магазиновић транспоновано је у мислећи субјекат који кроз модерну игру утире пут женском писму дезинтегришући и преображавајући патријархални менталитет и стереотипно виђење женског пола у културном миљеу матичне средине. Њена „Школа за ритмику и пластику” имала је за циљ преображај и креирање образованих српских жена кроз уметност игре, као најмасовније васпитно средство. С друге стране, свесна да је већина њених савременица незаинтересована за богаћење властитог образовања, оштроумна Мага своју еманципаторску борбу промишљено каналише и води кроз обраћање мушком делу српског друштва путем новинских чланака у *Политици* утичући на тај начин на стварање новог, савременог мушкарца који ће прихватити освешћену и ослобођену модерну жену.

Наративно ткиво овог животописа Вера Обрадовић завршава поглављем о кореодрамским изразима Маге Магазиновић (стр. 146–148) упућујући читаоце на значај ове врсте уметничког стваралаштва за деловање на укупан културни миље и промену утемељене свести једног друштва. Специфичност Магиног кореодрамског стваралаштва, у којем се средиште пажње усмерава ка значају женских ликова из епске књижевности, ауторка назива епско-патриотском кореодрамом. Промисљеним избором мотива који су блиски и пријемчиви српском културном миљеу и менталитету, Мага још једном показује вештину да на домишљат начин подигне свест о потреби реформе женског идентитета.

Крај монографије (стр. 153–173) Вера Обрадовић крунише фотографијама играчке трупе Маге Магазиновић, које попут њених кореографија служе као још једно средство за дезинтеграцију стереотипног виђења женског тела. Огољена женска стопала, руке и ноге, односно дугачки костими који прекривају женска тела и девојке преобучене у мушка одела у потпуности декомпоују традиционалне приказе жене као мајке или објекта мушког уживања и истичу нови женски идентитет и однос према женском телу.

На крају, можемо закључити да штиво пред нама не представља безличну биографију једне знамените личности лишена циља и ставова приповедача. Густо куцани редови показују колико је Вера Обрадовић упозната са тематиком о којој пише и колико је професионално, али и лично, посвећена да кроз ову монографију отелотвори целокупни реформаторски учинак Маге Магазиновић. Књига *Мага Магазиновић: Модерна игра уместо доктората из филозофије* представља својеврстан омаж талентованој уметници, али и сведочанство епохе у којој је започета борба за женску самосвест и даје нам пример како појединац властитим педагошким радом и залагањем може да утиче на еманципацију колективне друштвене свести.



## INSTRUCTIONS FOR AUTHORS ON PAPER PREPARATION

**Formatting.** Papers should be sent as *Microsoft Office Word* files (version 2000, 2003, 2007), font *Times New Roman*, font size 12. Page setup margins should be 2.5 cm (top, bottom) and 2.5 cm (left, right), paper size A4 (210 mm x 297 mm). Paragraphs should be formatted with line spacing 1.5, and justified (Format, Paragraph, Indents and Spacing, Alignment, Justified). Do not break words at the end of the line.

**Paper length.** Research papers should not exceed 37.000 characters (spaces included), and reviews should not be longer than 8.000 characters (spaces included).

**Language, alphabet.** The languages of publication in the TEME is English (font *Times New Roman*). Contributions be rejected if the language is not at the appropriate level of correctness and style. If the authors wish to increase the visibility of their papers, they are supposed to submit Serbian version of the article as well (as Supplementary file - Word format, using the Cyrillic alphabet).

### PAPER

The author should remove from the text of the paper all the details that could identify him/her as the author. Authors must enter all the necessary data during the electronic submission of the paper.

### PAPER STRUCTURE

- **Paper title in English**
- **Abstract in English** 100 to 250 words, followed by 5 key words.
- The title and the abstract of the paper should be directly linked to the paper content, with no information that would identify the author(s) of the paper.
- **Paper title in Serbian**
- **Abstract in Serbian**, followed by 5 key words.
- The paper should follow the **IMRAD** structure (Introduction, Methods, Results and Discussion), when it presents an empirical study
- **Paper body** should not contain more than three levels of subdivision into *sections* and *sub-sections*. Level one sections should be introduced by headings printed in *Italic* and in **CAPITAL LETTERS**, formatted as centred. Level two sections should be introduced by headings in *Italic*, with the initial capital letter, formatted as centred. Level-one and level-two headings should be separated from the previous text by one line. Level three sections should be introduced by a heading printed in *Italic*, but placed as a regular paragraph, separated by a full-stop from the text that follows.

Each paragraph should have the first line indented (1 cm).

*In-text citations:* Whenever referring to a source (monograph, article, statistical source), the author should cite the source in the text, using the

author-date system (Surname, year of publication, pages referred to, all in brackets) – Please, refer to the table at the end of these *Instructions*.

- When referring to several works by the same author, provide all the years of publication chronologically after the author's name. If there are several works by the same author published the same year, provide further specification using letters (a, b,...) after the year of publication: "...confirming this hypothesis (Wuthnow, 1987a, p. 32)...".

- When referring to several works by different authors, provide the authors' names in brackets following the alphabetical order, separating authors by semi-colon: "... several studies were central to this question (Jakšić, 1993; Iannaccone, 1994; Stark and Finke, 2000)."

Direct quotations can be included in the text if not longer than 20 words. Longer quotations should be given as separate paragraphs, spaced-out from the previous and following text, and with the following formatting: Format, Paragraph, Indents and Spacing, Left 1 cm, Right 1 cm, Line spacing – Single; for instance:

To explain how “culture through language affects the way we think and communicate with others of different background” (Gumperz, 2001, p. 35), Gumperz states:

“Conversational inference is partly a matter of a priori extra-textual knowledge, stereotypes and attitudes, but it is also to a large extent constructed through talk” (Gumperz, 2001, p.37).”

**It is crucial that the in-text citations and references should match the literature listed at the end of the paper. All in-text citations and references must be listed in the References, and the References must not contain sources not referred to or cited in the text.** The bibliography listed at the end of the paper should contain author names and source titles in original languages and alphabets, without translation.

*Tables, graphs, and figures.* Tables, graphs and figures should be numbered (sequentially), with captions explaining their content. Captions should precede tables, but follow graphs and figures. Graphs and figures must be clearly visible in the text, so they should be provided in 300dpi resolution. Graphs and figures must be single objects (no Drawing elements added). Where necessary, mathematical formulas should be added to the text using Microsoft Equation Editor.

*Appendices.* should be marked by *letters* (sequentially), e.g. Appendix A, Appendix B etc., and should contain a title describing the content of the appendix. When there is only one appendix, no letters are necessary in its title (only "Appendix").

➤ **Literature (References).** A complete list of references should be provided as a separate section at the end of the paper. The references should be listed in accordance with the **APA Style**. The references should be listed alphabetically, by the authors' last (family) names. For publication titles in Serbian, the English translation should also be

provided in brackets. The works by the same author should be listed chronologically (from the most to the least recent ones). Wherever possible, provide the DOI number, too, in addition to other reference data.

➤ **Summary in Serbian.** Please provide a summary at the end of the paper, after the References section. The summary should not be longer than 1/10 of the paper (i.e. 2,000 to 3,700 characters). The summary should be formatted as *Italic*, with single line spacing.

### EXAMPLES OF SOURCE QUOTING AND REFERENCING:

#### Journal papers and articles – 1 author

##### **In-text citation:**

(Manouselis, 2008), i.e. (Manouselis, 2008, p. 55)

##### **In ‘References’:**

Manouselis, N. (2008). Deploying and evaluating multiattribute product recommendation in e-markets. *International Journal of Management & Decision Making*, 9, 43-61. doi:10.1504/IJMDM.2008.016041

#### Journal papers and articles – 2 to 6 authors

##### **In-text citation:**

First reference: (Uxó, Paúl, & Febrero, 2011)

Subsequent references: (Uxó et al., 2011)

##### **In ‘References’:**

Uxó, J., Paúl, J., & Febrero, E. (2011). Current account imbalances in the monetary union and the great recession: Causes and policies. *Panoeconomicus*, 58(5), 571-592.

#### Journal papers and articles – more than 6 authors

##### **In-text citation:**

(Cummings et al., 2010, p. 833)

##### **In ‘References’:**

Cummings, E., Schermerhorn, A., Merrilees, C., Goetze-Morey, M., Shirlow, P., & Cairns, E. (2010). Political violence and child adjustment in Northern Ireland: Testing pathways in a social-ecological model including single-and two-parent families. *Developmental Psychology*, 46, 827-841. doi: 10.1037/a0019668

#### Book – 1 author

##### **In-text citation:**

(Heschl, 2001, p. 33)

##### **In ‘References’:**

Heschl, A. (2001). *The intelligent genome: On the origin of the human mind by mutation and selection*. New York, NY: Springer-Verlag.

#### Book – edited volume

##### **In-text citation:**

(Lenzenweger & Hooley, 2002)

**In ‘References’:**

Lenzenweger, M. F., & Hooley, J. M. (Eds.). (2002). *Principles of experimental psychopathology: Essays in honor of Brendan A. Maher*. Washington, DC: American Psychological Association.

**Paper or chapter in an edited volume****In-text citation:**

(Cvitković, 2007)

**In ‘References’:**

Cvitkovic, I. (2007). Katolicizam [Catholicism]. U A. Mimica i M. Bogdanović (Prir.), *Sociološki rečnik [Dictionary of Sociology]* (str. 226-227). Beograd: Zavod za udžbenike.

**Encyclopaedia entry****In-text citation:**

(Lindgren, 2001)

**In ‘References’:**

Lindgren, H. C. (2001). Stereotyping. In *The Corsini encyclopedia of psychology and behavioral science* (Vol. 4, pp. 1617-1618). New York, NY: Wiley.

**Papers in Conference Proceedings****In-text citation:**

(Bubanj, 2010)

**In ‘References’:**

Bubanj, S., Milenković, S., Stanković, R., Bubanj, R., Atanasković, A., Živanović, P. et al. (2010). Correlation of explosive strength and frontal postural status. In: Stanković, R. (Ed.): *XIV International Scientific Congress FIS Communications 2010 in Sport, Physical Education and Recreation* (191-196). Niš: University of Niš, Faculty of Sport and Physical Education.

**PhD Dissertations, MA Theses****In-text citation:**

(Gibson, 2007)

**In ‘References’:**

Gibson, L. S. (2007). *Considering critical thinking and History 12: One teacher’s story* (Master’s thesis). Retrieved from <https://circle.ubc.ca/>

**Institutions as authors****In-text citation:**

(Републички завод за статистику, 2011)

**In ‘References’:**

Републички завод за статистику. *Месечни статистички билтен*. Бр. 11 (2011).

**Laws****In-text citation:**

(Закон о основама система васпитања и образовања, 2004, чл. 5, ст. 2, тач. 3.)



**In ‘References’:**

Закон о основама система васпитања и образовања, Службени гласник РС. Бр. 62 (2004)

<b>Legal and other documents</b>
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**In-text citation:**

(Legal Consequences for States of the Continued Presence of South Africa in Namibia (South West Africa) notwithstanding Security Council Resolution 276, 1971)

**In ‘References’:**

Legal Consequences for States of the Continued Presence of South Africa in Namibia (South West Africa) notwithstanding Security Council Resolution 276, (1970), ICJ Reports (1971) 12, at 14

Please refer to:

**Publication Manual of the American Psychological Association, 6th Edition, 2009;**

<http://www.library.cornell.edu/resrch/citmanage/apa>

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