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The (Geo)Politics of Democracy in Serbia

Filip Ejdus

COUNTRY REPORT
RSC/Southeastern Europe 2025/02

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Robert Schuman Centre for Advanced Studies
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March 2025

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Published in March 2024 by the European University Institute.
Badia Fiesolana, via dei Roccettini 9
I – 50014 San Domenico di Fiesole (FI)
Italy
www.eui.eu

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The (Geo)Politics of Democracy in Serbia

Filip Ejdus[1]

1. Introduction

Over the past decade, the state of democracy in Serbia has gradually but steadily declined. The process has reached the point where Serbia can no longer be classified as a democracy, even a flawed one. Serbia holds elections, but they are not free and fair, as the playing field is so tilted in favour of the incumbent that the outcome is a foregone conclusion. While Serbia formally has a separation of powers, real power is concentrated in the hands of one person – President Aleksandar Vučić - and the party he controls. Instead of the rule of law, Serbia operates under rule by law. Freedom of speech exists formally, but the media is tightly controlled by the regime, and critical voices are silenced through disinformation, smear campaigns, SLAPP lawsuits, and other forms of intimidation. Serbia's backsliding has accelerated further with the fraudulent elections in 2023 and 2024, as well as the repression of environmental and student activists since the summer of 2024. To capture Serbia's democratic backsliding, scholars have used a variety of terms, including “hybrid regime”, “stabilitocracy”, “competitive authoritarianism”, “illiberal democracy”, and “spin dictatorship”.

Contrary to expectations by scholars and policy makers, Serbia regressed after it became a candidate for EU membership in 2012 and began its EU accession negotiations in 2014. Since then, and as of 2024, Serbia has opened 22 out of 35 chapters and provisionally closed two (Chapter 25: Science and Research, and Chapter 26: Education and Culture). Since 2016, Serbia’s modest preparedness for membership has stagnated, and since 2021, there has been no progress in the negotiations, with annual country reports largely repeating the same assessments year after year.[2] While there are examples in the history of EU enlargement where countries, such as Hungary, backslid after becoming EU members, Serbia is unique in that it has backslid substantively during accession negotiations.

Serbia’s backsliding occurred within the context of a serious deterioration in the geopolitical situation in Europe following the Maidan revolution and Russia's annexation of Crimea in 2014. In the years that followed, Europe faced a series of crises, including the migration crisis, Brexit, the COVID-19 pandemic, and Russia's full-scale invasion of Ukraine, among others. These developments motivated the EU, traditionally committed to civilian and normative power since

[1] Filip Ejdus is Professor of Security Studies at the Faculty of Political Science, University of Belgrade, Serbia.

[2] Milena Mihajlović, "Serbia’s Challenging Journey to the EU: Reforms Required for Membership," European Policy Centre, 3 April 2024, https://cep.org.rs/en/blog/serbias-challenging-journey-to-the-eu-reforms-required-for-membership/.

its establishment, to declare an ambition to become a geopolitical player.[3] This shifting geopolitical landscape in Europe occurred against the backdrop of tectonic shifts in global geopolitics, including the rise of China and the BRICS, the (re)election of Donald Trump and the global success of populism, the emergence of new disruptive technologies, and proxy wars between great powers in the Middle East and Africa. As a result, global defence spending has surged to levels higher than during the Cold War, and the threat of direct conflict between nuclear powers has come dangerously close.

The existing literature on backsliding mostly focuses on the analysis of domestic factors. Some works have shed light on the role of authoritarian states, while only a few discussed the role of the EU. This report will focus on the role of major external actors and their growing geopolitical conflict in the process of Serbia's de-democratization from 2014 to 2024. Due to space limitations, the report will focus on the role of four major geopolitical players (EU, US, Russia and China), intentionally omitting several smaller and middle powers. In a nutshell, the report challenges the conventional wisdom prevalent in some Western policy circles, which suggests that threats to Serbia's democracy come either from domestic illiberal actors or from authoritarian states like Russia and China. As will be shown, Serbia's backsliding is geopolitical as it at least partly attributable to the structural conditions of the renewed East-West geopolitical conflict, where both sides bear some responsibility—if not for promoting, then for facilitating the entrenchment of a hybrid regime.

The rest of the report on Serbia's 'geopolitical backsliding' is structured in the following way. Section two depicts the state of democracy and European integration in Serbia and reviews the scholarly literature about this. Section three identifies the most relevant geopolitical actors, analyses their strategic goals and bilateral relations with Serbia. Section four systematises their channels and agents of influence in Serbia. Finally, Section five examines the observable effects of these geopolitical actors on the state of democracy in Serbia. The conclusion summarises key points, discusses their relevance and provides some ideas for further research.

2. Geopoliticising the State of Democracy

Ever since the global economic crisis and the war in Georgia in 2008, the world has witnessed a twin phenomenon: a growing rise in geopolitical rivalries and global democratic backsliding. In contrast to the rise of autocracies in the 20th century, contemporary autocratization usually does not come about through sudden coups and rapid breakdowns but rather through incremental erosion of democratic institutions.[4] In 2024, Freedom House reported the 18th consecutive year of global decline in freedoms.[5]

The Western Balkan region is no exception to this trend. Over the past decade, democratic backsliding has transformed the Western Balkan states from aspiring but unconsolidated liberal democracies into regimes that have been characterized as competitive

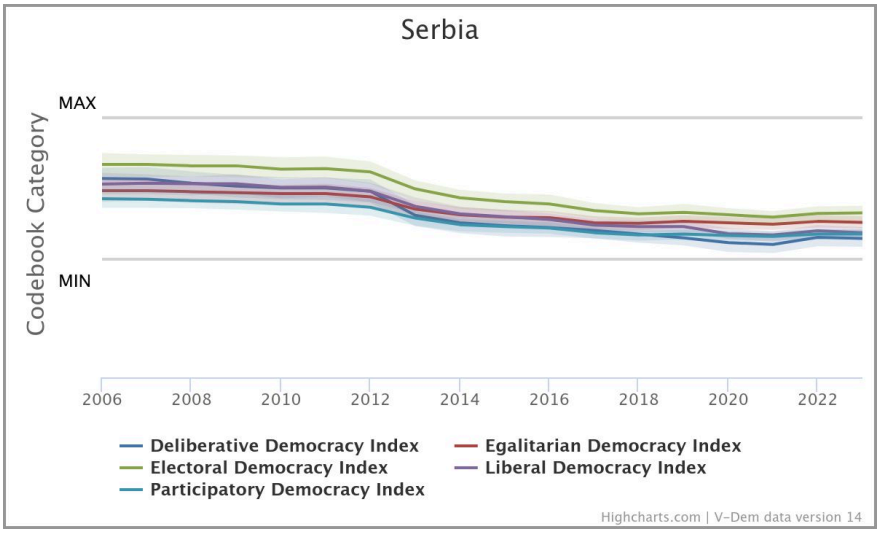
[3] Ian Manners, "Normative Power Europe: A Contradiction in Terms?" *JCMS: Journal of Common Market Studies* 40, no. 2 (2002): 235–258; Pierre Haroche, "A 'Geopolitical Commission': Supranationalism Meets Global Power Competition," *JCMS: Journal of Common Market Studies* 61, no. 4 (2023): 970–987.

[4] Steven Levitsky and Daniel Ziblatt, *How Democracies Die* (New York: Crown Publishing, 2018); David Runciman, *How Democracy Ends* (New York: Basic Books, 2018).

[5] *Freedom in the World 2024: The Mounting Damage of Flawed Elections and Armed Conflict* (Washington, DC: Freedom House, 2024), 2.

authoritarianisms,[6] hybrid regimes,[7] spin dictatorships,[8] stabilitocracies,[9] electoral authoritarianism,[10] or captured states.[11]

While most of the region experienced at least some democratic reversal, Serbia's regression stands out. In the Varieties of Democracy index, Serbia's democracy clearly suffered the most among all Western Balkan countries since 2006. According to this index, the decline started in 2012, coinciding with the arrival of the ruling Serbian Progressive Party. This decline applies to all five dimensions of democracy covered: liberal, electoral, deliberative, participatory, and egalitarian (see Graph 1).



Graph 1: The state of democracy in Serbia according to the Varieties of Democracy Index (2006-2023)

According to the Freedom in the World report published by Freedom House, Serbia's backsliding was first noted in the 2015 report (each report analyses the preceding year). This decline coincides with the rise to power of Aleksandar Vučić, who became prime minister in 2014 (see Graph 2). The backsliding accelerated with Vučić's victory in the 2017 presidential

[6] Florian Bieber, *The Rise of Authoritarianism in the Western Balkans* (New York: Palgrave Macmillan, 2018).

[7] Freedom House, *Nations in Transit 2020: Dropping the Democratic Facade* (Washington, DC: Freedom House, 2020).

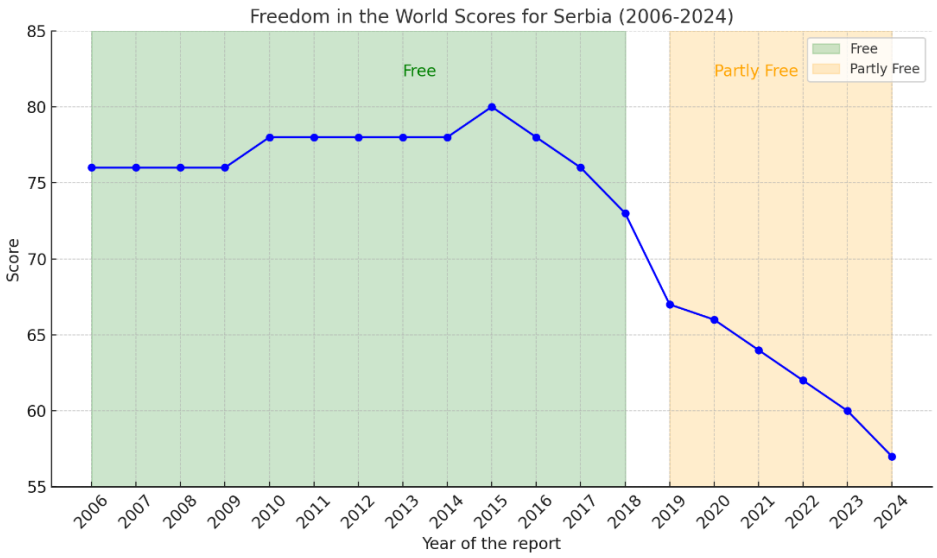
[8] Sergei Guriev and Daniel Treisman, *Spin Dictators: The Changing Face of Tyranny in the 21st Century* (Princeton, NJ: Princeton University Press, 2022).

[9] Marko Kmezić and Florian Bieber, eds., *The Crisis of Democracy in the Western Balkans: An Anatomy of Stabilitocracy* (Graz: Balkans in Europe Policy Advisory Group, 2017).

[10] Dušan Pavlović, *The Political Economy Behind the Gradual Demise of Democratic Institutions in Serbia* (Belgrade: Faculty of Political Science, University of Belgrade, 2021).

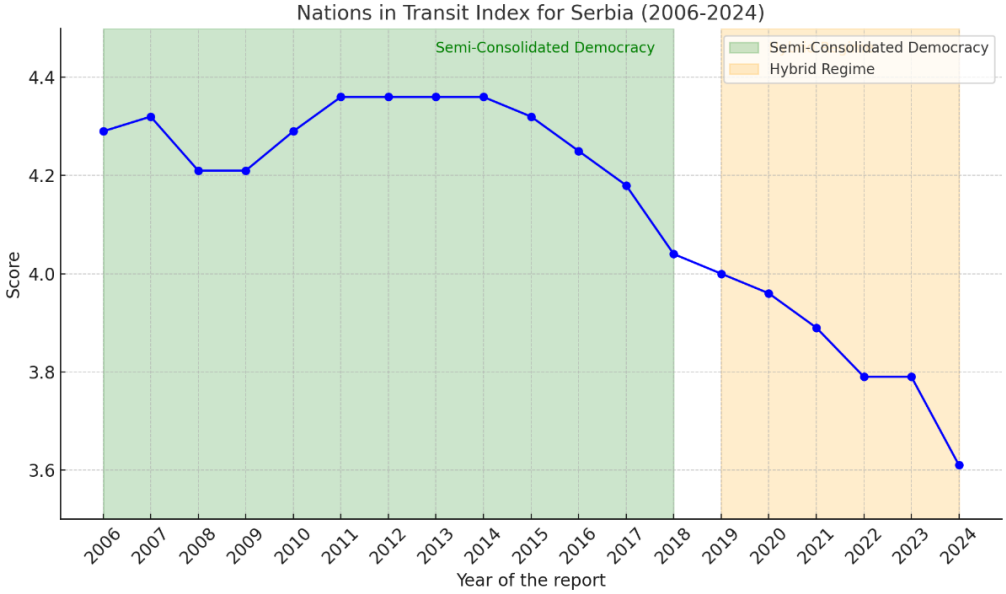
[11] European Commission, *A Credible Enlargement Perspective for and Enhanced EU Engagement with the Western Balkans* (Brussels: European Commission, 2018); Milada Anna Vachudova, "EU Enlargement and State Capture in the Western Balkans," in Resilience in the Western Balkans: The EU, Stability and Autocracy, eds. Florian Bieber and Nikolaos Tzifakis (Cham: Palgrave Macmillan, 2019), 63–84; Valery Perry and Soeren Keil, "The Business of State Capture in the Western Balkans: An Introduction," *Southeastern Europe* 42, no. 1 (2018): 1–14; Solveig Richter and Natasha Wunsch, "Money, Power, Glory: The Linkages Between EU Conditionality and State Capture in the Western Balkans," *Journal of European Public Policy* 27, no. 1 (2020): 41–62; Predrag Petrović and Saša Đorđević, "Failed Intelligence Reform, State Capture, and Authoritarian Turn in Serbia," *International Journal of Intelligence and CounterIntelligence* 36, no. 2 (2023): 272–296.

elections. In the 2019 report, for the first time since Milošević was ousted and the democratic transition began in 2000, Serbia was characterized as a "partly free" country.[12]



Graph 2: State of freedoms in Serbia according to the Freedom in the World index 2006-2024

A similar trend is identified by Nations in Transit, another index from Freedom House, which also reported the beginning of the backsliding in the 2015 report.[13] The 2020 report downgraded Serbia from a "Semi-Consolidated Democracy" to a "Hybrid Regime" (see Graph 3).[14] The report identifies the greatest backsliding in the areas of independent media, electoral process, and national democratic governance (see Graph 4).

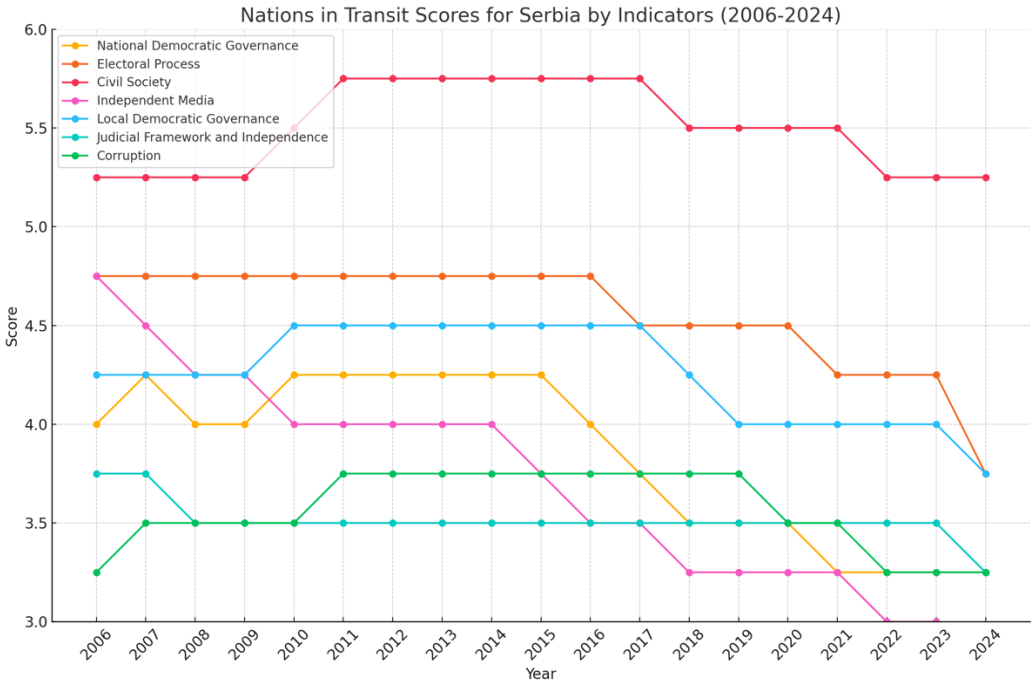


Graph 3: State of democracy in Serbia according to Nations in Transit Index (2006-2024)

[12] Freedom House, *Freedom in the World 2019: Democracy in Retreat* (Washington, DC: Freedom House, 2019).

[13] Freedom House, *Nations in Transit 2015: Democracy on the Defensive in Europe and Eurasia* (Washington, DC: Freedom House, 2015).

[14] Freedom House, *Nations in Transit 2019: Dropping the Democratic Façade* (Washington, DC: Freedom House, 2019), 3.



Graph 4: State of democracy in Serbia according to Nations in Transit Index by indicators (2006-2024)

In addition to the indices and assessment of institutions in numerous international reports, the state of democracy in Serbia has been the subject of a growing body of scholarship. Before Aleksandar Vučić's ascent to power, despite three transfers of power (2003, 2008, 2012), Serbia's transition remained incomplete. Scholars focused on understanding the factors hindering Serbia's path toward consolidated democracy after 2000,[15] its stalled Europeanization,[16] and the persistence of illiberal actors and networks within the formal framework of democracy.[17] Most studies dealing with the post-2012 backsliding focused on the domestic aspects and drivers of gradual autocratization under Vučić. While some works captured this phenomenon holistically,[18] others focused on aspects of this backsliding, such as unfinished statehood,[19] captured media,[20] absence of the rule of law,[21] popular protests,[22]

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[15] Dušan Pavlović and Slobodan Antonić, *Konsolidacija demokratskih ustanova u Srbiji: 2000–2005* (Beograd: Službeni glasnik, 2007).

[16] Jelena Subotić, "Explaining Difficult States: The Problems of Europeanization in Serbia," *East European Politics and Societies* 24, no. 4 (2010): 595–616.

[17] Tim Edmunds, "Illiberal Resilience in Serbia," *Journal of Democracy* 20, no. 1 (2009): 128–142.

[18] Antonino Castaldo, "Back to Competitive Authoritarianism? Democratic Backsliding in Vučić's Serbia," *Europe-Asia Studies* 72, no. 10 (2020): 1611–1633.

[19] Filip Milačić, "Stateness and Democratic Backsliding in the Former Yugoslavia: How Political Actors Subvert Democracy in the Name of the Nation," *Southeast European and Black Sea Studies* 21, no. 1 (2021): 77–97.

[20] Marko Kmezić, "Captured Media: Limitations and Structural Hindrances to Media Freedom in Serbia," *Review of Central and East European Law* 43, no. 4 (2018): 457–482; Nebojša Vladisavljević, "Media Discourse and the Quality of Democracy in Serbia after Milošević," *Europe-Asia Studies* 72, no. 1 (2020): 8–32; Aleksandra Krstić, "Digital Transformation of Journalism and Media in Serbia: What Has Gone Wrong?" *Journalism* 24, no. 1 (2023): 1–17.

[21] Milena Tripkovic, "Crime that 'Withered Away?' Democratic Backsliding and Non-Punitive Populism," *International Criminology* 2, no. 2 (2024): 123–145.

[22] Karlo Kralj, Indraneel Sircar, and Danijela Dolenec, "Against Dictatorship, Against Backsliding? Examining the Effect of Serbian Anti-Government Protests on the 2020 Electoral Boycott," *East European Politics and Societies* (2024 forthcoming).

university autonomy,[23] electoral manipulations,[24] extractive institutions, and misuse of public resources.[25]

Only a segment of this literature has focused on the external aspects of the autocratization process, usually attributing the blame to Russia and other authoritarian powers,[26] but sometimes also to the EU.[27] While these studies implicitly capture the role of geopolitics, they do not do so explicitly. This is an important omission because external actors do not operate in a vacuum but in a context often described as "the return of geopolitics".[28] This context implies the erosion of the post-Cold War liberal international order, defined by US hegemony, the rise of multipolarity, and the revival of concepts, practices, and discourses belonging to classical geopolitics such as great power rivalry, territorial annexations, expansionist wars, and spheres of influence that have been proscribed due to their association with imperialism and Nazi Germany.

This report aims to address this gap in the literature and place more analytical focus on the geopolitical aspects of Serbia's backsliding. To be sure, the rise of Aleksandar Vučić's regime has strong domestic ideological, institutional, political, and economic drivers. As such, it certainly cannot be attributed solely to external and geopolitical factors. However, the geopolitical environment in Europe and the world has facilitated the process of autocratization in Serbia in at least five interconnected ways.

First, the worsening of the global geopolitical situation has created more space for political elites in Serbia to restrict or suspend democratic principles under the pretext of threatened national security. Second, the geopolitical deterioration has led major Western actors to increasingly prioritize their own strategic interests, stability, and geopolitical alignment in the Western Balkans over democratization. Third, the relative decline of the West and EU enlargement fatigue have invited the increased presence of authoritarian actors in the Western

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[23] Slobodan Tomić and Branislav Radeljić, "University Autonomy Under Democratic Backsliding: A Case Study of a Plagiarism Investigation Against Serbian Minister of Finance (2014–2019)," *Higher Education* 84, no. 5 (2022): 979–1001.

[24] Dejan Bursać and Dušan Vučićević, "Election Boycott in a Hybrid Regime: The Case of 2020 Parliamentary Elections in Serbia," *New Perspectives* 29, no. 2 (2021): 187–196; Dušan Pavlović, "Parliamentary and Local Elections in Serbia 2023," *Contemporary Southeastern Europe* 11, no. 1 (2024): 1–11; Slobodan Tomić and Zlatko Kovačić, "Electoral Fraud in Competitive Authoritarianism: a Forensic Analysis of Serbian Presidential Elections in 2017 and 2022," *Political Analysis*, 2024 (forthcoming).

[25] Dušan Pavlović, *"How to Approach State Capture in Post-Communist Europe: A New Research Agenda," Journal of Contemporary European Studies* 31, no. 3 (2023): 526–541.

[26] Vladimir Vučković, "The West is Dear, but the East is Dearer: Policy Pressures and Actors' Preferences in Serbia," *Prague Security Studies Institute*, May 2023; Mieczysław P. Boduszyński and Calla Li, "External Autocratic Influence, the Balkans, and Democratic Decline," in *Geopolitical Turmoil in the Balkans and Eastern Mediterranean*, edited by Nikolaos Tzifakis (Cham: Palgrave Macmillan, 2023), 89–118.

[27] Marko Kmezić, "EU Rule of Law Conditionality: Democracy or 'Stabilitocracy' Promotion in the Western Balkans?" in *The Europeanisation of the Western Balkans: A Failure of EU Conditionality?*, edited by Jelena Džankić, Soeren Keil, and Marko Kmezić (Cham: Palgrave Macmillan, 2019), 87–109; Richter, Solveig, and Natasha Wunsch, "Money, Power, Glory: The Linkages Between EU Conditionality and State Capture in the Western Balkans," *Journal of European Public Policy* 27, no. 1 (January 2020): 41–62; Pavlović, Dušan, "Is European Enlargement Policy a Form of Non-Democracy Promotion?" *Journal of International Relations and Development* 26, no. 2 (June 2023): 324–346; Marko Stojić, "Anchoring or Undermining Democracy: The European People's Party and Democratic Backsliding in Serbia," *JCMS: Journal of Common Market Studies* 62, no. 2 (2024): 546-563.

[28] Stefano Guzzini, ed., *The return of geopolitics in Europe?: social mechanisms and foreign policy identity crises* (Cambridge: Cambridge University Press, 2012); Walter Russell Mead, "The return of geopolitics: The revenge of the revisionist powers," *Foreign Affairs* 93 (2014): 69.

Balkans. Fourth, Serbian political elites have not only welcomed but actively encouraged the presence of these non-Western actors, as they can offer alternative sources of economic and political support and increase the regime's ability to resist Western conditionality related to democratization. Fifth, in some cases, geopolitical deterioration has motivated non-Western actors to openly or covertly support non-democratic forces, actors, and processes in Serbia, further facilitating democratic backsliding.

3. Identifying the Geopolitical Actors

The main geopolitical actors for Serbia are the EU, the US, Russia, and China. The strategic goal of the EU and the US, notwithstanding their specific interests, strategies, and tactics, is to include the region in the Western geopolitical fold. Russia and China are the West's rivals in the region, the former more of a geopolitical rival and the latter more of a geoeconomic one. This section will provide a brief overview of Serbia's bilateral relations with each of these actors and analyse their short-, mid-, and long-term tactical and strategic orientations towards Serbia.

The EU is the actor with the most comprehensive bilateral relations with Serbia. The EU declared its doors open to the membership of Western Balkan states, including Serbia, in Thessaloniki in 2003. Serbia signed the Association and Stabilization Agreement (SAA) in 2008, became a candidate for full membership in 2012, and began accession negotiations in 2014. The EU is by far the most important trading partner for Serbia, accounting for 60 per cent of its trade in 2023.[29] While Serbia has a deficit in its trade with the EU, it has shrunk from 52 per cent in 2009 to 14 per cent in 2023. The EU is also the biggest investor in Serbia, with its foreign direct investments accounting for 58 per cent of total FDI in Serbia between 2010 and 2023. Moreover, the EU is the biggest donor, providing over 3 billion Euros in non-refundable aid since 2001.

The EU's strategy towards Serbia is part of its wider strategy towards the Western Balkans. The core assumption of this strategy is that "the future of the region as an integral part of the EU is in the Union's very own political, security, and economic interest."[30] Public support for EU membership fell from 69.9 per cent in 2006 to 43 per cent in 2022, and 34.8 per cent in 2024.[31] As the biggest country in the region and a country without whom the search for sustainable solutions to the outstanding problems of the region is unfeasible, the EU is particularly interested in keeping Serbia firmly attached to the European project. However, this is complicated by Serbia's policy of neutrality, close relations with Russia and China, and strategic hedging, resulting in poor foreign policy alignment with the EU, especially when it comes to issues pertinent to the interests of Moscow and Beijing.

Bilateral relations between the US and Serbia began in the late 19th century, but the US presence in the region accelerated with the demise of Yugoslavia, reaching its lowest point during the 1999 NATO intervention. The US presence in Serbia today is multi-dimensional, although economically far behind the EU's. It is the sixth most important trading partner overall (behind the EU, CEFTA, China, Russia, and Turkey) and the first in the field of IT services. The US is also among the biggest donors, with approximately 1 billion USD in non-refundable

[29] European Union Delegation to the Republic of Serbia, "Trade," https://europa.rs/trade/?lang=en.

[30] European Commission, *A Credible Enlargement Perspective for and Enhanced EU Engagement with the Western Balkans* (Brussels: European Commission, 2018).

[31] Dragoslav Rašeta, Dimitrije Milić, Miljan Mladenović, Lana Radnić, i Mijat Kostić, "Međunarodni položaj Srbije: mediji i stavovi građana," *Novi treći put,* May 2024, https://istrazivanja.rs/wp-content/uploads/2024/06/Medunarodni-polozaj-Srbije-mediji-i-stavovi-gradani.pdf.

aid provided to Serbia since 2001.[32] As a foreign investor, the US ranks 7th, with a share of 2.3 per cent of all FDIs in the period from 2010 to 2021.[33]

The main goal of the US strategy towards Serbia is to support its accession to the EU and to help it develop as a democracy "at peace with itself and its neighbours."[34] To that end, the US has been trying to create incentives for Serbia to weaken its ties with the US's geopolitical peer-competitors. One sector of particular interest in this respect is energy. The US sees the green transition as a good opportunity for US investors to help Serbia "diversify and liberalize its energy market to comply with European Energy Community obligations and reduce Russian influence." In 2024, the US and Serbia signed an Agreement on Strategic Cooperation in Energy, which aims to increase US investments in support of Serbia's green transition and sustainable development.[35]

The US also maintains intensive defence cooperation with Serbia through the Partnership for Peace Program, the State Partnership Program with the Ohio National Guard and Serbian Armed Forces (SAF), and assistance to the peacekeeping capacities of SAF. However, this cooperation is often underreported in the regime-controlled media, which frequently foregrounds cooperation with Russia and China and promotes anti-NATO discourse.[36] This media policy may result from the traditionally low trust most Serbs have in the US (the lowest of all other actors surveyed in this report) due to its Kosovo policy and NATO bombing in 1999, but it also perpetuates this sentiment.[37]

Serbia's relations with Russia have deep historic and cultural roots. While diplomatic relations date from the 19th century, Russia has been a geopolitical actor in the Balkans for centuries. Russia's economic presence in Serbia is mostly visible in the energy sector. In 2008, Russia's Gazprom Neft bought 51 per cent of shares in the Serbian Oil Industry (Ser. Naftna industrija Srbije). In 2023, Russia was Serbia's fourth-biggest trading partner (behind the EU, CEFTA, and China), with 2.7 billion Euros worth of trade.[38] From 2010 to 2021, Russia ranked as the second-largest source of FDIs, with 7.45 per cent (dwarfed by the EU's 63.5 per cent).[39] Russia and Serbia have had a free trade agreement since 2000 and a Strategic Partnership deal since 2013.

Serbia relies on Russia's support in the United Nations Security Council in its opposition to Kosovo's independence, declared unilaterally in February 2008. The two countries signed a Declaration on Strategic Partnership in 2013 and established close defence, security, and intelligence cooperation. Russia is one of the major donors and sellers of armaments to Serbia,

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[32] "SAD donirale Srbiji blizu milijardu dolara od 2000. godine," *Nova Ekonomija*, 18 March 2021, https://novaekonomija.rs/vesti-iz-zemlje/sad-donirale-srbiji-blizu-milijardu-dolara-od-2000-godine.

[33] Tamara Bajčić, "Kompanije iz EU ubedljivo najveći investitori u Srbiji," *Demostat*, 7 February 2023, https://demostat.rs/sr/vesti/ekskluziva/kompanije-iz-eu-ubedljivo-najveci-investitori-u-srbiji/1680.

[34] US Department of State, *Integrated Country Strategy: Serbia,* 8 April 2022. https://www.state.gov/wp-content/uploads/2022/06/ICS_EUR_Serbia_Public.pdf.

[35] US Department of State, "United States and Serbia Sign Agreement on Strategic Cooperation in Energy," Office of the Spokesperson, 18 September 2024, https://www.state.gov/united-states-and-serbia-sign-agreement-on-strategic-cooperation-in-energy/.

[36] Filip Ejdus and Catherine Hoeffler, "Crypto-Atlanticism: The untold preferences of policy elites in neutral and non-aligned states," *Contemporary Security Policy* 45, no.2 (2024): 331-363.

[37] Rašeta et al., "Međunarodni položaj Srbije: mediji i stavovi građana," 17.

[38] European Union Delegation to the Republic of Serbia, "Trade," https://europa.rs/trade/?lang=en.

[39] "Rusija se pohvalila ulaganjima: NIS dodelio 60 miliona evra u projekte Vlade Srbije," *The Geopost,* 23 May 2023, https://thegeopost.com/sr/vesti/rusija-se-pohvalila-ulaganjima-nis-dodelio-60-miliona-evra-u-projekte-vlade-srbije/

including fighter jets, helicopters, and anti-aircraft systems. In 2012, the two countries established the Russian Serbian Humanitarian Center in Niš. Of all the main geopolitical actors, Russia traditionally enjoys the highest level of public trust in Serbia, which hasn't eroded even after its full invasion of Ukraine in February 2022. [40]

While China was traditionally never one of the key external actors for Serbia, this began to change in the late 2000s. Like Russia, although slightly less vocal, China is supporting Serbia's opposition to Kosovo's independence in the United Nations Security Council. In August 2009, Serbian President Tadić travelled to China and, together with Chinese President Hu Jintao, signed a joint statement on strategic partnership. This was part of what Tadić called the "four pillars foreign policy" doctrine, implying aspirations to join the EU while maintaining multi-vectoral strategic engagement with other key players, i.e., the US, EU, Russia, and China. [41]

Since China launched the Belt and Road project in 2013, it has considered the Western Balkans as an important gateway to Western markets.[42] This makes China primarily a geoeconomic actor and Western peer-competitor in this region. During the COVID-19 pandemic, China rushed to assist Serbia with vaccines and other medical aid, while President Vučić claimed that European solidarity was dead.[43] The "ironclad friendship," as the relations are dubbed after the purchase of Smederevo Steel Plant by Hesteel Group in 2016, is confirmed also in the domain of defence cooperation. Serbia is the first country in Europe to buy Chinese anti-aircraft missile systems (FK-3) and military drones (CH-95 and CH-92A).[44] Chinese President Xi Jinping visited Serbia twice in eight years (2016 and 2024), reaffirming that Serbia is one of Beijing's key European partners in its Belt and Road Initiative, launched in 2013.

The strategic partnership has been followed by a constant intensification in economic relations.[45] Trade between the two countries is constantly rising, making China Serbia's third-largest trading partner in 2023, although Serbia has a significant trade deficit. [46] Chinese investments in Serbia have also been on the rise. Between 2010 and 2021, with investments worth 1.78 billion Euros, China ranked fourth (5.73 per cent).[47] However, there are many concerns that these investments have been corrosive due to a lack of transparency, negative effects on the environment, and disrespect for the rule of law and labour rights.[48] The most important Chinese investments are in the mining, automobile, and metal industries. Another aspect of economic relations has been Chinese loans for infrastructure projects, including

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[40] Rašeta et al., "Međunarodni položaj Srbije: mediji i stavovi građana," 17.

[41] "Četiri stuba spoljne politike", *RTS,* 30 August 2009, https://www.rts.rs/lat/vesti/politika/123741/cetiri-stuba-srpske-spoljne-politike.html.

[42] Branislav Stanicek with Simona Tarpova, "China's Strategic Interests in the Western Balkans," European Parliamentary Research Service, June 2022, https://www.europarl.europa.eu/RegData/etudes/BRIE/2022/733558/EPRS_BRI(2022)733558_EN.pdf.

[43] Vuk Vuksanović, "China Has its Eyes on Serbia," *Foreign Policy,* 8 April 2020, https://foreignpolicy.com/2020/04/08/china-serbia-aleksander-vucic-xi-jinping-coronavirus/.

[44] "Serbia highlights importance of Chinese defence equipement," *Reuters,* 23 October 2023, https://www.reuters.com/world/serbia-highlights-importance-chinese-defence-equipment-2023-10-23/.

[45] Stefan Vladisavljev, "Kina i Srbija Strateške investicije," BFPE, March 2022, https://bfpe.org/wp-content/uploads/2022/03/Kina-i-Srbija-Strates%CC%8Cke-investicije.pdf.

[46] European Union Delegation to the Republic of Serbia, "Trade," https://europa.rs/trade/?lang=en.

[47] "U ovoj godini u Srbiji dominiraju kineske investicije," *Bizlife,* 23 October 2022, https://bizlife.rs/u-ovoj-godini-u-srbiji-najvise-investirali-ki.

[48] Ben Reade, "Achilles Steel? Investigating Corrosive Capital in the Smederevo Železara Privatization," *Journal of Regional Security* 18, no. 2 (2023): 187–216.

bridges, highways, and railways.[49] The trade volume and FDIs can be expected to continue to rise, as the two countries signed a Free Trade Agreement in 2023. [50]

In addition to the four geopolitical actors discussed above, Serbia has close ties with several other economically powerful states including Turkey and the Gulf States. However, due to relatively negligible effects of these relations on the state of Serbia's democracy.

4. Systematising the Channels of Influence

The European Union has arguably the strongest influence on domestic politics in Serbia. Its strongest mechanism is the enlargement policy. Ever since Serbia declared its ambition to join the EU following the fall of Milošević in 2000, and especially since Serbia obtained candidate status in 2009, the EU has conditioned any progress in the accession process with domestic reforms but also progress in the Belgrade-Pristina dialogue and more recently its foreign policy alignment. In addition to this, the EU has been the largest external donor of democratisation projects.[51] The main agents of the EU's influence in Serbia, in addition to the EU itself and its institutions including its Delegation to Serbia, have been the EU's member states. Other advocates of European integration are pro-EU political parties and various civil-society organisations that receive EU grants to promote democratization, rule of law and European integration.

The influence of the US in domestic politics of Serbia has largely been in the function of supporting EU efforts. Just like the EU, the US has used the carrot and stick policy to push for domestic changes including cooperation with the ICTY, democratic reforms, dialogue with Pristina and economic liberalization. One of the channels through which the US has offered incentives was USAID which invested more than 882 million USD since 2001 in economic and democratic development.[52] However, the US has also used sticks to punish actors perceived to have a malign role in the Serbian society. This includes high officials in the Serbian government such as Aleksandar Vulin (former chief of BIA, current vice president of the Serbian government),[53] organized crime figures such as Zvonko Veselinović and Milan

[49] "The share of Serbian debt to China in total public debt rose from 1.2 per cent in 2012 to 8.4 in 2023." Mila Manojlović, "Rast duga Srbije prema Kini: Čelično prijateljstvo sa kamatom," *Radio slobodna Evropa,* 8 August 2023, https://www.slobodnaevropa.org/a/srbija-kina-dug-rast/32539404.html.

[50] "Sporazum o slobodnoj trgovini između Vlade Republike Srbije i Vlade Narodne Republike Kine", *Službeni glasnik,* 6/2023.

[51] Tijana Rečević, "International Influence on Democracy in Serbia", pp. 235-263, in *Undermining Democracy: Processes and Institutions in Serbia 2010-2020,* edited Dušan Spasojević (Beograd: CRTA, 2021); Will Bartlett, "International assistance, donor interests, and state capture in the Western Balkans," *Journal of Contemporary European Studies* (2020): 184-200; Adea Gafuri and Meltem Muftuler-Bac, "Caught between stability and democracy in the Western Balkans: a comparative analysis of paths of accession to the European Union," *East European Politics* 37, no. 2 (2021): 267-291; Sonja Grimm and Okka Lou Mathis, "Democratization via aid? The European Union's democracy promotion in the Western Balkans 1994–2010," *European Union Politics* 19, no. 1 (2018): 163-184; Adam Fagan and Natasha Wunsch, "Fostering institutionalisation? The impact of the EU accession process on state–civil society relations in Serbia," *Acta Politica* 54, No. 4 (2019): 607-624.

[52] USAID Serbia, "USAID Assistance highlights, 2001-Present", March 2022, https://www.usaid.gov/sites/default/files/2022-12/US_Aid_Brochure_2022_ENG_FINAL_MAR_2022_2.pdf.

[53] "Američke sankcije šefu obaveštajne službe Srbije Aleksandru Vulinu," *Aljazeera,* 11 July 2023, https://balkans.aljazeera.net/news/balkan/2023/7/11/americke-sankcije-sefu-obavjestajne-sluzbe-srbije-aleksandru-vulinu.

Radoičić,[54] as well as companies that offer military support to Russia.[55] The main agents of the US influence are the US Embassy in Belgrade and US funding agencies such as USAID and NED. Other conduits of US are civil society organisations and higher education institutions that receive US grants to work on democratic and economic reforms, the rule of law and other relevant topics.

Russia's influence in Serbia relies on several mechanisms. The first one is direct support that the Russian government has been providing to the increasingly authoritarian regime of Serbia in quelling pro-democratic movements. In 2021, they formed a working group on the fight against "coloured revolutions,"[56] The second mechanism of influence is targeting Serbian public opinion through pro Kremlin propaganda network. The network includes media such as Sputnik (operates in Serbia since 2015) and RT (operates in Serbia since 2022) but also dozens of websites and portals,[57] Telegram channels connected to Russia's troll factories and government agencies[58] as well as domestic Russia-friendly media such as RTS (the public broadcaster) and virtually all televisions with national frequency most notably Happy TV but also daily magazines with the highest circulation in the country such as Informer and Večernje novosti.[59] The main agents of Russian influence are the Russian Embassy and Ruski Dom as well as various Kremlin-based think tanks and organisations (e.g. the Gorchakov Fund). Other conduits of Russian influence are the ruling SNS party, the Serbian Orthodox Church (through its alignment with the Russian Orthodox Church), as well as a few other pro-Russian political parties and organisations susch as the Serbian Radical Party (SRS), Socialist Party of Serbia (SPS), Movement of Socialists (PS), Serbian Right, Russian party etc.

Finally, China has two mechanisms of influence on domestic politics, all of them indirect. The first one is through untransparent investments that have a corrosive effect on Serbia's rule of law, human rights and environmental standards. The second mechanism is through soft power projection that increases the attractiveness of China's leadership and its governance model. The main agent of influence is the Chinese Embassy as well as three Confucius institutes established in universities in Belgrade (2006), Novi Sad (2023) and Niš (2024) as well as several Conficus classrooms in more than a dozen elementary and high schools around Serbia.[60] While the official goal of these activities is strictly of a cultural nature, critics point out their goal of disseminating authoritarian values.[61] Their efforts are strongly supported by the

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[54] Katarina Stevanović, "Američke sankcije, Veselinović i Radoičić: Šta znači kada Amerika uvede sankcije pojedincima," *BBC,* 9 December 2021, https://www.bbc.com/serbian/lat/balkan-59594166.

[55] "SAD uvele sankcije firmama iz Srbije i Crne Gore zbog vojne saradnje sa Rusijom", *The Voice of America,* 30 October 2024, https://www.glasamerike.net/a/sad-sankcije-rusija-izbegavanje-srbija-crna-gora-firme-ventrade/7844967.html.

[56] Dušan Stojanović, "Serbia and Russia pledge to combat "color revolutions", *Associated Press*, 3 December 2021, https://apnews.com/article/europe-russia-environment-and-nature-moscow-serbia-9c1e4fef540909927d02caa1f7d05c1b.

[57] Mirjana Jevtović and Miloš Katić, "How Russia Spreads Fake News in the Balkans," *Radio Free Europe,* 22 September 2024, https://www.rferl.org/a/russian-fake-news-disinformation-balkans/33126528.html.

[58] Polina Greisman, "Russian propaganda in Serbia and the Western Balkans: The Case of Telegram Channels," Belgrade Centre for Security Policy, February 2024, https://bezbednost.org/wp-content/uploads/2024/02/safehaven-eng-04.pdf.

[59] "RTS is conducting a sophisticated pro-Russian campaign," *Demostat,* 15 March 2024, https://demostat.rs/sr/vesti/analize/rts-is-conducting-a-sophisticated-pro-russian-campaign/2027.

[60] Ljudmila Cvetković and Maja Živanović, "Bliske veze srpskih i kineskih državnih univerziteta," *Radio Free Europe,* 6 May 2021, https://www.slobodnaevropa.org/a/kina-i-u-srbiji-sara%C4%91uje-sa-univerzitetima/31241214.html.

[61] Jan Petter Myklebust, "Confucius institutions close as China relations deteriorate," *University World News,* 16 May 2020, https://www.universityworldnews.com/post.php?story=20200513092025679.

Serbian government which invites corrosive investments and engages in activities promoting China, its leadership and the “steel friendship”. Following the cooperation agreement in 2018, the University of Belgrade, the University of Novi Sad, and the University of Nis all signed a cooperation agreement with Shanghai's Jiao Tong University.[62] In February 2020, the University of Kragujevac signed an agreement with the Chinese company Dahua Technology focusing on video-surveillance technology. In 2020, China opened its Cultural Centre on the spot where once stood the Chinese embassy which was destroyed during NATO intervention in 1999.

5. The Outcomes of Externalities on Transitional Contexts

Even though the EU has been the biggest democratization donor, its success has been limited. In fact, Serbia and Montenegro are the only two countries in the history of EU enlargement that stopped being democracies while negotiating EU membership. When Belgrade started its accession negotiations in 2014, Serbia was still considered a free country, but ten years later it has become a hybrid regime that steadily backslides year after year (see graph 3). Due to the deterioration of the geopolitical situation in Europe, the EU increasingly prioritized stability in the Western Balkans. The regime of Aleksandar Vučić learned how to exploit EU concerns to capture state power.[63] Progress in the EU facilitated the normalization dialogue with Pristina, which was added to the Copenhagen criteria and became part of the accession negotiations (Chapter 35).[64] Belgrade’s concessions made in the Brussels Agreement (2013) resulted in the EU being more tolerant of the gradual state capture by the Vučić regime. Moreover, by turning a blind eye to electoral engineering in Belgrade and the suppression of pluralism among Kosovo Serbs— the model that was subsequently exported to Serbia proper—the EU facilitated the establishment of a hybrid regime there. Under Vučić, Serbia became a poster child for stabilitocracies: governments that are rewarded by the EU for delivering stability while pretending to pursue EU membership, even though they "rely on informal, clientelist structures, control of the media, and the regular production of crises to undermine democracy and the rule of law".[65]

Despite investing millions in Serbia’s democratization, the effects of US engagement on Serbia’s domestic context have not been entirely positive either. Following the regime change, the US was very vocal in insisting that Belgrade cooperate with the International Criminal Tribunal for the former Yugoslavia (ICTY) and extradite individuals indicted for war crimes, including former President Milošević. This stance divided the new democratic elites, ended their coalition, hampered democratic reform, and laid the groundwork for the return of the old guard that ultimately de-democratized the country.[66] Over the last decade or so, the US has played a secondary role regarding democratic reforms. Like the EU, it turned a blind eye to the backsliding regime if Serbia delivered on geopolitically important matters, including the Belgrade-Pristina dialogue and, more recently, ammunition exports to Ukraine and prospective lithium mining.

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[62] Reid Standish, Ljudmila Cvetković, and Maja Živanović, “China Deepens its Balkans ties using Serbian universities”, *Radio Free Europe,* 11 May 2021, https://www.rferl.org/a/china-balkans-ties-using-serbian-universities/31249503.html.

[63] Rečević, “International Influence on Democracy in Serbia,” 235-263.

[64] Adea Gafuri and Meltem Muftuler-Bac, "Caught between stability and democracy in the Western Balkans: a comparative analysis of paths of accession to the European Union.”

[65] Florian Bieber, *The Rise of Authoritarianism in the Western Balkans*, 176.

[66] Nebojša Vladisavljević. *Uspon i pad demokratije posle Petog oktobra* (Beograd: Arhipelag, 2019).

Following Donald Trump's assumption of his second presidency in 2025 and the statement by FBI director about illegal activities of USAID, the Serbian regime immediately launched a crackdown on five major NGOs that frequently criticize the government, sending police to their offices to investigate potential embezzlement. These NGOs were targeted as the USAID grantees, even though the largest recipient of USAID grants was the state itself, which was not covered by the investigation. This was obviously just a pretext not only to intimidate and silence critics but also to find a scapegoat for the regime's inability to suppress the massive student protests that had been ongoing since the fall of the canopy in Novi Sad on 1 November 2024.[67]

The effects of Russia on Serbia's domestic politics have been more straightforward. The bilateral working group on the fight against colour revolutions has been utilized to put Russian dissidents in Serbia under surveillance and quell pro-democracy protests following electoral fraud in December 2023.[68] Pro-Russian media and far-right groups in Serbia have effectively campaigned not only against the pro-Western foreign policy course of the country but also against liberal domestic tendencies, including the normalization of relations with neighbours, transitional justice, and LGBTIQ rights, which enjoy very low public support as a result.[69] Putin is the most popular politician in the country, and his governance style continues to inspire the ruling elite in Serbia. Policy concepts such as the "Serbian world," foreign agents' law,[70] and virulent anti-Atlanticism[71] permeate the dominant policy discourse.[72]

Finally, of the four biggest geopolitical players, the effects of China on domestic politics have been the least pronounced, but not entirely negligible. The most visible adverse effect has been the adoption of Chinese digital authoritarianism. In February 2017, the Serbian Ministry of Interior signed a Strategic Partnership Agreement with Huawei, which was soon followed by the installation of approximately 1,000 smart surveillance cameras in violation of Serbian and European data protection laws and standards.[73] Despite strong pushback from civil society, the government not only proceeded with the project,[74] but Serbia became blanketed with Chinese-made smart surveillance systems in the years that followed. During the COVID-19

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[67] Civil Rights Defenders, "Serbian police crack down on civil society organisations", 29 February 2025, https://crd.org/2025/02/27/serbian-police-crack-down-on-civil-society-organisations/.

[68] „Brnabić izjavila da je ruska služba dostavila podatke vlastima o protestu," *Radio Free Europe*, 24 December 2023, https://www.slobodnaevropa.org/a/brnabic-rusija-protest-izbori-beograd/32746025.html.

[69] Marija Vučić and Vesna Radojević, "Right-wing universe in Serbia: biggest rivals support each other the most, Informer the biggest hub," *Raskrikavanje,* 6 November 2024, https://www.raskrikavanje.rs/page.php?id=Right-wing-universe-in-Serbia-Biggest-rivals-support-each-other-the-most--Informer-the-biggest-hub-1418.

[70] Nedeljko Čolić and Filip Đorđevič, "Vulin's Witch-hunt: Wat is hidden behind advocating for the so-called foreign agents law," *NIN,* 16 May 2024, https://www.nin.rs/english/news/49673/what-is-hidden-behind-advocating-for-the-so-called-foreign-agents-law-vulins-witch-hunt.

[71] Filip Ejdus and Catherine Hoeffler, "Crypto-Atlanticism: The untold preferences of policy elites in neutral and non-aligned states," *Contemporary Security Policy* 45, no. 2 (2024): 331-363.

[72] Dimitar Bechev, "Hedging its bets: Serbia between Russa and the EU," *Carnegie,* 19 January 2023. https://carnegieendowment.org/research/2023/01/hedging-its-bets-serbia-between-russia-and-the-eu?center=europe.

[73] Alessandra Briganti, "Serbia's Smart city has become a political flashpoint," *Wired,* 18 August 2021, https://www.wired.com/story/belgrade-huawei-cameras/.

[74] "New surveillance cameras in Belgrade: location and human rights impact analysis – 'witheld'", SHARE Foundation, 19 March 2019, https://www.sharefoundation.info/en/new-surveillance-cameras-in-belgrade-location-and-human-rights-impact-analysis-withheld/

pandemic, especially in its early phases, Serbia adopted the stringent Chinese model of response, including the central role of the military,[75] strict lockdowns, and curfews. [76]

6. Key Highlights

After more than a decade of democratic transition, Serbia began to backslide around 2014. By 2024, it can be categorized as a hybrid regime with a tendency toward further deterioration. While this process of autocratization has significant domestic drivers, this report focuses on the geopolitical context in which it occurred. Specifically, it argues that this backsliding is geopolitical in that it has been facilitated by geopolitical deterioration in Europe, which entered a phase of proxy conflict in Ukraine following Russia's annexation of Crimea in 2014.

As the report demonstrates, the conflict between the West and Russia over Ukraine, coupled with growing rivalry with China, has had corrosive effects on Serbia's democracy. Western states and organizations increasingly prioritized stability and geopolitical alignment over domestic reforms. This shift provided greater latitude for Serbia's political elites to evade conditionality pressures from the West, hedge their bets, and undermine democratic principles at home.

At the same time, Russia and China intensified their engagement with Serbia, advancing agendas that further eroded democratic norms. Russia's geopolitical influence strengthened anti-Western and anti-liberal actors and sentiments in Serbia. Moreover, the Kremlin offered direct support to the regime in Belgrade in quelling domestic opposition. Meanwhile, China's geoeconomic activities contributed to the diffusion of digital authoritarianism. Chinese-made smart cameras with face recognition capabilities covered Serbian cities in violation of domestic and European regulation. Together, these external pressures have compounded the challenges to Serbia's democratic development.

These insights are important as they show how geopolitical tensions fuel democratic recession in Serbia. In contrast to the conventional wisdom, which is prevalent in Western policy circles, the blame for the backsliding in Serbia cannot solely be attributed to illiberal forces inside or outside the country, but also to the pragmatic turn in the West. Future research reports could expand the analysis and investigate how smaller illiberal states such as the Arab Emirates, Turkey and Hungary, which have agendas of their own in Serbia, influence the rule of law and democracy. Also, one could specifically zoom into the declining role of international organizations as a motor of democratization and increasingly becoming a partner in state capture. Finally, while this report focused predominantly on states, more research is needed on the geopolitics of corrosive capital, which is also an important factor of state capture.

[75] Alexandre Lambert, Filip Ejdus, and Thomas Schmidt, "Deployment of Armed Forces During the Coronavirus Crisis: Compliance with the OSCE Code of Conduct," *OSCE Insights* no. 5 (2020): 71–83.

[76] Danica Šantić and Marina Antić, "Serbia in the Time of COVID-19: Between 'Corona Diplomacy,' Tough Measures, and Migration Management," *Eurasian Geography and Economics* 61, no. 4-5 (2020): 546–558.

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