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RUSSIAN ENERGODIPLOMACY IN THE BALKANS: PURPOSES, FACTORS, AND OBSTACLES**

Abstract

The study's subject is the Russian Federation's energy diplomacy in Turkey and the Balkans. The article aims to identify the goals, factors, and obstacles to implementing the Russian energy diplomacy in Turkey and the Balkans. Theoretical and methodological approach of the research: the paradigm of neorealism in international relations, system approach, comparative analysis. Results and conclusions of the paper: The author clarified the importance of the Turkish and Balkan direction in Russian geopolitics and energy diplomacy, noting the Bosphorus and the Dardanelles' key role in Russian security and foreign economic relations. Turkey is now Russia's most important partner and stakeholder in the Balkan transport and energy highways. Anti-Russian sanctions have led to Serbia's enclave location in the Balkan energy diplomacy system, exacerbating the competition of world powers and transnational structures for raw materials and the territory of Serbia.

Keywords: energodiplomacy, contemporary Russia, Turkey, Balkans, purposes, factors, obstacles

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INTRODUCTION

The relevance of the topic. In the context of an unprecedented but unsuccessful blockade by the “collective West”, Russia desperately needs geopolitical and geo-economic routes of access to the international space. The Balkan Peninsula and the adjacent territories of Turkey and the Eastern Mediterranean are one of such strategic routes as the Baltic, the Arctic, the Caspian Sea, and the Far East. At the same time, the membership of most Balkan countries in NATO and the European Union does not negate the contradictions between the interests of the states, their desire to maximize their raw materials, transit, and industrial potential in competition with their neighbors. Threats of international terrorism and ethnic and religious extremism are clearly expressed in the Balkans, complicating interstate cooperation in the energy sector. These circumstances make the topic relevant for political science.

The study’s subject is the Russian Federation’s energy diplomacy in Turkey and the Balkans. The article aims to identify the goals, factors, and obstacles to implementing the Russian energy diplomacy in Turkey and the Balkans.

The territorial scope of the study includes the Russian Federation, Turkey, and Serbia, as well as other states located on the Balkan Peninsula. The chronological framework of the work consists of the period 2020–2024, when the West’s desire to block Russian energy diplomacy in the Balkans was visibly manifested, and new forms of energy diplomacy were being sought in the context of anti-Russian sanctions.

The degree of development of the scientific topic: Generalizing studies of Russian energy diplomacy were created by Sergey Zhiznin (Zhiznin 2005) and Alexander I. Shumilin (Shumilin 2008). The role of the Balkan direction in Russian energy diplomacy is highlighted by A.R. Tekeev (Tekeev 2014), K. Khudoley and E. Koloskov (Khudoley and Koloskov 2021), T.V. Akhmadulina and P.V. Lazareva (Akhmadulina and Lazareva 2023), and M. Yaruyev (Yaruyev 2023, 2024). Among the foreign studies of the Balkan energy diplomacy of Russia, one can mention the works of A. Rustem and R. de Wick, K. Dunlop, etc. (Rustemi *et al.* 2021), N. Stanoevich (Stanojević 2023), D.R. Bashkalo and M. Sikimich (Башкало и Сикимич 2023). The impact of the Ukrainian conflict on the Balkans is being investigated by Lj. Kolarski (Kolarski 2022).

Another critical area of research is the analysis of achievements and problems of Russian-Serbian energy cooperation. Among the Russian

works on the topic, we note the report by E.G. Entina, E.S. Chimiris, and M.S. Lozovich (Entina, Chimiris, and Lozovich 2023), articles by D. Rastegaev (Rastegaev 2023), S. Zhuikova (Zhuikova 2023), and A. Belogoryev (Belogoryev 2023). P. Yakovlev's publication (Yakovlev 2024) is devoted to a narrower aspect – trade between the Russian Federation and Serbia. For their part, Serbian researchers assess the bilateral relations of our countries as a whole (Trajlović and Rapaić 2023), Serbia's positioning in a multipolar world (Proroković 2023), issues of national security and neutrality of the country (Mihajlović and Obradović 2022), and the impact of European integration on Serbian-Russian interaction (Stanković 2021).

In the context of anti-Russian sanctions, the importance of Russian-Turkish cooperation in the energy sector has increased. Its factors and manifestations are evaluated by I.V. Zeleneva and E. A. Savkina (Zeleneva and Savkina 2020), K. A. Gumbatov (Gumbatov 2021), A. Kostrov (Kostrov 2022), A.V. Gerasimov (Gerasimov 2023), P. Zavalny (Zavalny 2024), and N. Kurbanov (Kurbanov 2024). E. A. Markelova (Markelova 2022) and Zh. Kanapiyanova (Kanapiyanova 2022) conducted special cooperation studies in the gas sector. The strategy and resources of Turkey's influence in the Balkans were studied by V. Andreev (Andreev 2021), V.V. Evseev and others (Evseev, Pivovarenko, and Gadzhiev 2021). Experts from the Caspian Institute for Strategic Studies (Moscow) in 2023 predicted the progress of Russia and Turkey towards a strategic alliance (Caspian Institute of Strategic Studies 2023).

Thus, quite a lot of research on the topic has been conducted. At the same time, the geo-economic situation in Turkey and the Balkans is changing rapidly, and the latest trends in the development of Russian energy diplomacy in the region have not been studied enough.

The theoretical and methodological basis of the research includes the paradigm of neorealism in international relations and a systematic approach. The concepts of "key points" and "geopolitical fields" developed in postclassical geopolitics for the analysis of cross-border regions are applied (Cohen 2003; Kaplan 2013; Ballesteros 2015). A comparative study of Russia's energy diplomacy with the Balkan countries and Turkey before and after the start of a special military operation in Ukraine is carried out. The author believes that in the context of globalization, many states are experiencing a shortage of resources for their foreign economic and foreign policy influence, turning into "market states" with limited sovereignty; they have become the object of geopolitical rivalry between world powers and transnational associations.

The study's empirical basis consists of information sources such as international and interstate agreements, statistical data on the volume of trade turnover, exports, and imports of the studied countries, statements by political leaders, and mass media reports. The studied sources make it possible to determine the goals and directions of energy diplomacy, the favorable and hindering factors of its implementation, and the contradictory impact of the participation of the Balkan countries and Turkey in international organizations on their interaction with Russia.

CHARACTERISTICS OF THE BALKANS AND TURKEY AS A SPACE OF ENERGY DIPLOMACY

The Balkans and Turkey are promising areas for intergovernmental cooperation in the field of energy, being a capacious market in need of energy resources to develop modern sectors of the economy and transit towards the European Union. The combined population of these countries is over 133 million people (estimated for 2024), including 88.5 million people in Turkey. From the point of view of geopolitics, the Balkans and Turkey are a convenient transport and energy "bridge" between Western Europe and Asia. They give the EU access to the oil and gas fields of the Near East and the Caspian region. At the same time, from Russia's point of view, the Balkans and Turkey are an important "window to the world", a key point in the South-Western direction; this region opens up export routes for Russian energy carriers and energy technologies not only to the Balkans and Turkey, but also to countries in Africa and the Middle East. For China, the region provides access to European markets for goods, services, and capital. However, the interests of these actors do not coincide, which generates competition for political, economic, and ideological control over the Balkans. In addition, the West is seeking to transfer the Balkans and Turkey from a state of "cross" (competitive) geopolitical field to a state of "total" (wholly owned by NATO and the EU) field (Stanković 2021). Currently, only Serbia, Bosnia, and Herzegovina are not members of either NATO or the EU, but they also participate in European integration programs. From the point of view of the internal structure of the region, Turkey, Greece, and Serbia play key roles; they have the most advantageous location relative to oil and gas pipelines, railways, and highways. Turkey is actively striving to become a "gas" and "oil" hub – gas pipelines from Russia, Azerbaijan, and Iran, oil pipelines from Iran and Azerbaijan run through its territory, into

whose systems coal products from Central Asian countries are supplied by sea. Serbia is not in such a good position due to its lack of access to the sea (see map one below). The importance of “key points” is Istanbul, Thessaloniki, and Belgrade, and the junction points of various oil and gas pipelines. In the context of increased competition, the importance of the shelf of the Middle and Black Seas, on which geological exploration and production of energy resources and their transportation, is rising. For example, there has been an escalation of the Greek-Turkish and Turkish-Egyptian territorial conflicts.

Map 1. Gas pipeline routes through Turkey and the Balkans (for 2020).



Source: Business Magazine 2018

The geopolitical situation in the Balkans and the Eastern Mediterranean has changed qualitatively since the start of the special military operation in Ukraine (February 2022). NATO, the United States, and the EU have already imposed anti-Russian sanctions, seeking to completely exclude Russia's economic cooperation with the Balkan countries and Turkey, and thereby undermine Russian budget revenues and lead Russia to autarky. But despite these measures, Western policy has not achieved the expected success.

THE TURKISH DIRECTION OF THE RUSSIAN ENERGY DIPLOMACY

Turkey is a dynamically developing country, the second in the world in terms of growing demand for electricity and natural gas. But Turkey covers 74% of its energy needs through imports. Russia has become Turkey's leading export trading partner and the 4th largest importer. In particular, in 2020, Russia provided 33.6% of natural gas imports to Turkey; by 2022, this share had increased to almost 45% (Kanapiyanova 2022; Kostrov 2022). According to the Ministry of Economic Development of Russia, for 2022, the trade turnover of the Russian Federation with Turkey doubled and exceeded 69.8 billion dollars, primarily due to the sale of energy resources (51.5% of the value) (Kostrov 2022; Kurbanov 2024; Интерфакс 2022). However, the pressure of sanctions from the West led to the fact that in 2023, the trade turnover between the two countries decreased by 17% and was fixed at 57.0 billion dollars (РИА Новости 2024).

Turkey ranks third in the world ranking of importers of Russian gas (Gumbatov 2021, 471). As the Turkish newspaper *Hürriyet* notes, concerning data from the Energy Market Regulation Authority, in October 2023, Russian gas already accounted for 59.1% of all gas imported by Turkey, and Russia provided an urgent payment (TACC 2023). This contributed to reducing economic risks and the victory of R.T. Erdogan in the presidential elections. According to the Turkish Statistical Institute, for 2023, Exports of Russian liquefied natural gas (LNG) to Turkey increased 1.4 times compared to 2022 and reached 814 thousand tons.

Turkey is the third-largest buyer of Russian crude oil after China and India. According to the Reuters news agency, Turkey doubled its crude oil imports from Russia in 2022. In 2022, more than 200 million tons of crude oil and petroleum products from Russia, Kazakhstan, and Azerbaijan (mainly from the Russian Federation) passed through the Bosphorus and the Dardanelles (Kostrov 2022). According to the publication of the Turkish newspaper *Hürriyet*, in October 2023, Russia's share in Turkish oil imports increased to 49.9% compared with 40.74% a year earlier (TACC 2023). The export of Russian diesel fuel has also increased. Also, for 2023, Supplies of Russian thermal coal to Turkey increased by 46%, amounting to 27.5 million tons (Tadviser 2025). More than 70% of the cost of Russian supplies to Turkey for the first half of

2024 (16 billion US dollars) is fuel supplies (oil, gas, coal). Turkey partly uses these supplies for re-exports to EU countries, despite pressure from US sanctions, due to which the cost of Turkish imports from Russia decreased by 10.3% in January–June 2024, maintaining its physical volumes (РБК 2024).

Projects such as the Trans-Balkan gas pipeline, the Blue Stream gas pipeline (two lines provide pumping of 16 billion cubic meters of natural gas per year), and the Turkish Stream have been implemented. The construction costs of the Turkish Stream alone for 2012–2019, according to estimates by the Interfax news agency, amounted to \$ 13 billion, and the design capacity reached 31.5 billion cubic meters of gas per year; half of the volume is intended for Turkey, and half for the Balkan countries (Gumbatov 2021, 472–474; Kostrov 2022). It is planned to create a distribution hub in Turkey for gas exports to the European Union by developing the Turkish Stream gas pipeline infrastructure. The implementation of the gas hub project in Turkey started in the autumn of 2023.

The creation of generating capacities in Turkey plays a significant role in Russia's energy diplomacy. In particular, the Akkuyu nuclear power plant project, worth \$ 22 billion, is essential, as it is designed to generate 4,800 MW (10% of Turkey's needs). Russia fully funds the project. After completing the Akkuyu NPP construction, it will remain Rosatom's property. Despite the pressure from Western countries, the first batch of nuclear fuel was delivered to the station in April 2023. The first of the four reactors was implemented in 2023 and will reach its full design capacity in 2025. It is planned to sell the produced fuel on the Turkish market at a price above the market price (Вестник Кавказа 2024). Turkey will buy half of the electricity generated by Akkuyu for 15 years. The total cost of purchases will be about \$32 billion (Рыбарь 2023). Russian-Turkish negotiations are underway on Rosatom's construction of a second nuclear power plant, Sinop. Turkey intends to build a third nuclear power plant in the Igneada area in Thrace, northwest of the country. A joint venture of Rosatom and Turkish organizations will be able to conclude contracts for constructing new nuclear power plants.

An essential consequence of the Russian-Turkish energy cooperation was training young specialists at Russian universities and creating new jobs in the Turkish economy.

Cooperation between Russia and Turkey is also underway in the import substitution of equipment and maintenance of the energy industry.

The production of liquefied natural gas in the Russian Federation now depends on Western equipment, which has to be replaced. In particular, the Turkish company Karpowership supplies replacement equipment to Russia – gas turbines and floating power plants. However, according to the Turkish Institute of Statistics, TurkStat, the export of Turkish machinery to the Russian Federation for 9 months of 2022 amounted to only \$ 1.5 billion. (26% of the value of Turkish exports to Russia), which is not enough (Kostrov 2022). Turkey is not yet ready to permanently abandon the dollar and the euro in mutual payments with Russia, which can be compensated by the supply of Turkish goods and the activity of the Turkish construction business in the Russian Federation, and this will balance the value of Turkish exports and imports in bilateral relations (by the end of 2023, Turkish exports to the Russian Federation amounted to 11 billion dollars, and Russian exports to Turkey – over 46 billion dollars) (РИА Новости 2024).

So, the Russian energy diplomacy about Turkey has the following directions: 1) export of energy resources – oil and natural gas; 2) investments in the Turkish energy sector, including in electricity generation, nuclear energy, supply of energy equipment and services for its maintenance; 3) Russian–Turkish projects for the exploration and production of hydrocarbon resources; 4) import of equipment and maintenance of enterprises the energy sector. Due to its strategic location on the Balkans and the Middle East border, Turkey is an energy hub, partly replacing the lost markets of the European Union for Russia. Both countries benefit from energy cooperation without intermediaries.

According to the Caspian Institute for Strategic Studies (Moscow) assessment for September 2023, “over the past year and a half, the relationship between Russia and Turkey has increased many times, and in a variety of areas – from trade and logistics to energy and security. [...] The time has come to transform the situational alliance between Moscow and Ankara into a full-fledged strategic alliance. It is about joining forces in the name of joint dominance and to protect against external enemies. Such an alliance is based on political pragmatism, consideration of national and common interests, and the addition of potential to achieve a synergistic effect. In this union, each country will preserve its independence and cultural identity” (Caspian Institute of Strategic Studies 2023). The project of a single gas distribution hub in Turkey creates a fundamentally new geo-economic situation for the countries of Southern Europe and the Balkans. Their reliable

access to cheap energy resources from Russia and the countries of the Caspian basin (primarily from Azerbaijan) is emerging, which creates opportunities for accelerated economic development. The role of Hungary is noticeably increasing, and it, together with Turkey, is becoming an energy and political “switchboard” for the macroregion (Caspian Institute of Strategic Studies 2023).

At the same time, Turkey intends to become an independent energy power. Therefore, it actively develops energy imports from Azerbaijan, Iran, Algeria, and other countries. The Turkish TANAP gas pipeline objectively competes with Russian projects in the region. As noted by V. Andreev, Turkey is striving to gain a foothold in the energy sector of the Western Balkans, using the energy transition of these countries by the “Green Agenda” of the European Union, since Turkey has an infrastructure for natural gas transit to the Balkans (Andreev 2021).

RUSSIAN ENERGY DIPLOMACY TOWARDS SERBIA

A more restrained optimism should be applied when assessing Russian-Serbian relations. Cooperation between the two countries in the energy sector is based on the Declaration on Strategic Partnership between the Russian Federation and the Republic of Serbia, signed on May 24, 2013 (Официальный сайт Президента России 2013). In 2022, the trade turnover between the two countries increased by 53%, amounting to \$4.28 billion, but the Russian Federation provided only 4.28% of Serbia’s trade turnover with foreign governments (Евгений Пудовкин 2023; Trend Economy 2024). According to the calculations of the TrendEconomy portal, as a result, in 2023, Russia provides 4.33% of Serbia’s imports worth \$1.72 billion, as well as 3.86% of Serbia’s exports worth \$1.19 billion. Russia ranks fifth in the share of foreign countries in the import of silver and eighth in exports. As a result of pressure from Western sanctions, the value of trade between Russia and Serbia decreased in 2023 from \$4 billion to \$2.91 billion (by 25%) (Yakovlev 2024).

Energy resources account for a significant share of the trade turnover between the two countries. According to D. Rastegaev’s generalizations, Serbia covers 68% of its crude oil and 76% of its natural gas needs through imports (Rastegaev 2023). As a result of the implementation of the Balkan Stream project (its Serb section was commissioned in the summer of 2021), gas supplies from the Russian Federation to Serbia almost doubled in 2021–2022 (from 1,384 to 2,294 million cubic meters per year). The

share of Russian natural gas in the structure of Serbia's consumption in 2021 was 80%, and the share of Russian oil was about 23%. Russia carries out energy supplies at low special prices.

Gazprom Concern owns a key stake (56%) in Serbia's leading oil company, NIS (Naftna Industrija Srbije), a monopolist in oil exploration and production in the country. NIS owns the largest oil refinery in the Balkans, Pancevo, which was modernized thanks to investments from Gazprom. NIS and Lukoil control 27.6% of the Serbian gasoline retail market. Gazprom also owns 51% of shares in Banatsky Dvor, Serbia's only gas storage facility, and 50% of shares in Yugorosgaz, which buys Russian gas for Serbs (Rastegaev 2023).

In addition to energy trade, Russian-Serbian cooperation in creating and modernizing electric power plants is actively developing. The Russian concern Power Machines and the Electric Household of Serbia have modernized the Jerdap-1 hydroelectric power plant by 2021 and are implementing the same project at the Jerdap-2 station. In December 2021, Rosatom Concern and the Government of Serbia signed a general framework agreement on constructing the Center for Nuclear Science and Technology, the first in a foreign European country, co-founded by Rosatom (Rosatom 2022).

At the same time, Serbia is pursuing multi-vector diplomacy. It seeks to diversify oil and gas production routes and connect to pan-European, Balkan, and Turkish energy projects. In particular, we are talking about the Bulgarian-Serbian interconnector, opened in December 2023 in a Niche thanks to a grant from the European Union (it will provide 60% of the current consumption of natural gas in Serbia) (Europa 2025), and the Turkish TANAP project – The Trans Anatolian Natural Gas Pipeline Project, which brings gas from Azerbaijani fields to the Trans-Adriatic pipeline (TANAP 2025). Serbia's accession to anti-Russian sanctions under increasing pressure from the West cannot be ruled out.

RUSSIAN ENERGY DIPLOMACY IN THE REST OF THE BALKAN COUNTRIES

As for other Balkan countries' importance in energy contracts with Russia is lower. According to A. Belogoryev, in January–February 2023, Turkish Stream gas was distributed among the countries of the region in the following way: to Serbia, taking into account transit to Bosnia and Herzegovina – 40.3%, to Hungary – 35.0%, to Romania –

17.8%, to Northern Macedonia – 4.3%, to Greece – 2.6% (Belogoryev 2023). Bulgaria had a European Union permit to import Russian crude oil until April 2024. For 2023, Bulgaria imported \$2.5 billion worth of oil via the sea route (PBK 2023). The trade turnover between Russia and Romania decreased by almost 5 times in 2023, totaling no more than \$ 1 billion. Russian exports to this country in the first 10 months of 2023 amounted to 290.9 million euros (TACC 2024a). According to the Greek statistical service Elstat, in March 2024, the cost of imports from the Russian Federation decreased to 140.8 million euros, one-third less than in March 2023. As in other Balkan countries, energy was dominant in Greek imports (TACC 2024b). The growing competition with Russian supplies of liquefied natural gas provided by Greece is predicted.

The authorities and political figures of Bosnia and Herzegovina (BiH), especially the Republic of Srpska, show some interest in energy cooperation with the Russian Federation. Member of the Presidium of BiH, Milorad Dodik, speaking at the St. Petersburg International Economic Forum in June 2022, said: “The Balkans cannot live without Russian energy resources, without oil and gas (TACC 2022).” The Prime Minister of the Republic of Srpska, Radovan Viskovich, noted in October 2023 that Russian gas supplies are carried out at reduced prices, and the republic reached an agreement on signing at the end of 2023, an agreement on long-term gas supplies from the Russian Federation. A gas pipeline from Serbia to the Republic of Srpska is planned to be built (The Balkan Club 2023). At the same time, the Council of Ministers of BiH has been blocking the project “New Eastern Interconnection Bosnia and Herzegovina – Serbia” since April 2023 to reduce the country’s dependence on Russian gas in favor of Azerbaijani gas supplies through Croatia, lobbied by the United States and the EU. The necessary sections of the pipeline with all branches have already been built within the Republic of Srpska. Still, for gas to flow throughout BiH’s territory, the Muslim–Croatian Federation’s consent is necessary (Balkan Club 2025). While the Russian project is almost completed, the pro-Western project requires the construction of the Ionian-Adriatic gas pipeline, which, at best, will be effective in 2025. In June 2024, Srbiyagaz started work on the Pale – Jahorina gas distribution pipeline, creating a reliable Belgrade – Banja Luka interconnector. It should be noted that the Republic of Srpska consumes four times less gas than the Muslim-Croatian Federation (Balkan Club 2024).

CONCLUSIONS

The author clarified the importance of the Balkan direction in Russian geopolitics and energy diplomacy, noting the Bosphorus and the Dardanelles' key role in Russian security and foreign economic relations. Turkey is now Russia's most important partner and stakeholder in the Balkan transport and energy highways. Anti-Russian sanctions have led to Serbia's enclave location in the Balkan energy diplomacy system, exacerbating the competition of world powers and transnational structures for raw materials and the territory of Serbia.

The Russian energy diplomacy about Turkey has the following directions: 1) export of energy resources – oil and natural gas; 2) investments in the Turkish energy sector, including in electricity generation, nuclear energy, supply of energy equipment and services for its maintenance; 3) Russian–Turkish projects for the exploration and production of hydrocarbon resources; 4) import substitution of equipment and maintenance of enterprises the energy sector. Due to its strategic location on the Balkans and the Middle East border, Turkey is an energy hub, partly replacing the lost markets of the European Union for Russia. Both countries benefit from energy cooperation without intermediaries.

It can be concluded that the role of Turkey and Serbia in the Russian energy diplomacy has increased significantly since February 2022, while the rest of the region's countries have critically decreased. A partial exception can be recognized as Bosnia and Herzegovina, which is interested in importing Russian energy resources, updating its pipeline network, and power plants. However, the confederate type of statehood of this country and significant international pressure from NATO, the EU, and the United States make it difficult for reliable cooperation between Bosnia and Herzegovina and Russia.

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РУСКА ЕНЕРГОДИПЛОМАТИЈА НА БАЛКАНУ: ЦИЉЕВИ, ФАКТОРИ И ПРЕПРЕКЕ**

Резиме

Предмет истраживања је енергетска дипломатија Руске Федерације у Турској и на Балкану. Циљ рада је идентификација циљева, фактора и препрека у спровођењу руске енергетске дипломатије у Турској и на Балкану. Теоријско-методолошки приступ истраживања заснива се на парадигми неореализма у међународним односима, системском приступу и компаративној анализи. Резултати и закључци рада указују на разјашњење значаја турског и балканског правца у оквиру руске геополитике и енергетске дипломатије, при чему се посебно истиче кључна улога Босфора и Дарданела у обезбеђивању руске безбедности и спољноекономских односа. Турска данас представља најзначајнијег партнера и актера Русије у оквиру балканских транспортних и енергетских коридора. Антируске санкције довеле су до тога да се Србија нађе у енклавској позицији у систему балканске енергетске дипломатије, што је додатно појачало конкуренцију светских сила и транснационалних структура за сировинске ресурсе и територију Србије.

Кључне речи: енергетска дипломатија, савремена Русија, Турска, Балкан, циљеви, фактори, препреке

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