ENERGETSKA BEZBEDNOST POD LUPOM
Srbija i Zapadni Balkan

ENERGY SECURITY UNDER THE SPOTLIGHT
Serbia and the Western Balkans

ENERGETSKA BEZBEDNOST POD LUPOM
Srbija i Zapadni Balkan

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S A D R Ž A J

Glavni zaključak i preporuke

Implementacija ovih preporuka mogla bi pomoći Srbiji da poboljša svoju energetsku bezbednost, smanji rizike povezane sa spoljnim zavisnostima i otvori put ka održivijoj energetskoj budućnosti:

1. Nacionalizacija NIS-a ili pronalazak novog strateškog partnera: Razmotriti nacionalizaciju NIS-a kako bi se povratila kontrola nad kritičnim energetskim resursima i smanjila ranjivost od stranog uticaja u okolnostima odbijanja ruske strane da razgovara o mogućnosti prijateljskog preuzimanja kompanije od strane Republike Srbije. Kao druga opcija pojavljuje se pronalazak strateškog partnera koji bi preuzeo ruski vlasnički udeo u NIS-u. To bi poslalo snažnu poruku o posvećenosti Srbije svojoj energetskoj bezbednosti i interesima ekonomskog razvoja.

2. Diversifikacija izvora energije: Istražiti i ulagati u diversifikovane izvore energije, uključujući obnovljive izvore, kako bi se smanjila zavisnost od bilo koje pojedinačne zemlje ili entiteta. Ovo bi moglo uključivati projekte solarne, vetroenergije i hidroenergije.

3. Jačanje energetskih partnerstava: Negovati partnerstva s drugim zemljama i međunarodnim organizacijama kako bi se izgradio otporniji energetski lanac snabdevanja. Saradnja sa državama članicama Evropske unije ili drugim zapadnim državama poput SAD i Kraljevine Norveške mogla bi poboljšati energetsku bezbednost.

4. Investicije u energetsku infrastrukturu: Unaprediti i modernizovati energetsku infrastrukturu, uključujući skladišne objekte, cevovode i distribucione mreže, kako bi se osigurala efikasnost i pouzdanost u distribuciji energije.

5. Angažman u regionalnim energetskim inicijativama: Aktivno učestvovanje u regionalnim energetskim inicijativama i organizacijama kako bi se poboljšala saradnja sa susednim zemljama, razmenjivale najbolje prakse i razvijali zajednički energetski projekti.

6. Javna svest i obrazovanje: Povećati javnu svest o pitanjima energetske bezbednosti i značaju energetske nezavisnosti. Angažovati građane u diskusijama o energetskim politikama i koristima diversifikovanog energetskog portfolija.

7. Proaktivan dugoročan angažman na projektu litijumskog rudnika: Srbija može iskoristiti prihode generisane iz rudarenja litijuma kako bi investirala u i diversifikovala svoj energetski sektor, fokusirajući se na projekte obnovljive energije koji su usklađeni sa globalnim ciljevima održivosti.

8. Zelena tranzicija kao novi izvor rasta: Srbija može poboljšati svoju energetsku bezbednost dok odgovorno i održivo koristi svoje resurse litijuma, doprinoseći globalnoj tranziciji prema čistijim tehnologijama.

9. Osnivanje nacionalnog tima za borbu protiv dezinformacija: Stvoriti posvećen tim koji se fokusira na borbu protiv stranog uticaja i dezinformacija, koji će se sastojati od vladinih zvaničnika, predstavnika medija, grupa civilnog društva i stručnjaka za sajber bezbednost kako bi koordinirali akcije.

10. Kampanje podizanja javne svesti: Pokrenuti kampanje podizanja svesti kako bi se obavestili građani o opasnostima od dezinformacija i taktici koju koriste strane države. Istaknuti važnost proveravanja informacija iz više kredibilnih izvora.

11. Unapređenje medijske pismenosti: Razviti i implementirati obrazovne programe usmerene na medijsku pismenost na svim nivoima obrazovanja. Obučavanje građana kako da kritički procenjuju izvore informacija može ih osnažiti da prepoznaju i odole dezinformacijama.

12. Jačanje nezavisnih medija: Podržati nezavisno i na činjenicama zasnovano novinarstvo kako bi se promovirali kredibilni izvori vesti. Obizbediti finansijska sredstva i resurse za medije koji se pridržavaju visokih novinarskih standarda i suprotstavljaju lažnim narativima.

Main conclusion and recommendations

Implementing these recommendations could help Serbia enhance its energy security, reduce risks associated with external dependencies, and pave the way for a more sustainable energy future:

1. Nationalization of NIS or finding a new strategic partner: Consider the nationalization of NIS in order to regain control over critical energy resources and reduce vulnerability to foreign influence in the context of the Russian side's refusal to discuss the possibility of a friendly takeover of the company by the Republic of Serbia. As a second option, the search for a strategic partner who would take over the Russian ownership stake in NIS emerges. This would send a strong message about Serbia's commitment to its energy security and interests in economic development.
2. Diversification of Energy Sources: Explore and invest in diversified energy sources, including renewable energy, to reduce dependence on any single country or entity. This could include solar, wind, and hydroelectric power projects.
3. Strengthening Energy Partnerships: Foster partnerships with other countries and international organizations to build a more resilient energy supply chain. Collaborating with European Union member states or other Western nations could enhance energy security.
4. Investment in Energy Infrastructure: Enhance and modernize energy infrastructure, including storage facilities, pipelines, and distribution networks, to ensure efficiency and reliability in energy distribution.
5. Engagement in Regional Energy Initiatives: Active participation in regional energy initiatives and organizations to enhance cooperation with neighboring countries, share best practices, and develop joint energy projects.
6. Public Awareness and Education: Increase public awareness regarding energy security issues and the importance of energy independence. Engage citizens in discussions about energy policies and the benefits of a diversified energy portfolio.

7. Proactive engagement with lithium mine project: Serbia can use the revenues generated from lithium mining to invest in and diversify Serbia's energy sector, focusing on renewable energy projects that align with global sustainability goals.

8. Green transition as new source of growth: Serbia can enhance its energy security while leveraging its lithium resources responsibly and sustainably, contributing to the global transition towards cleaner technologies.

9. Establish a National Task Force to fight disinfromation: Create a dedicated task force focused on combating FIMI, comprising government officials, media representatives, civil society groups, and cybersecurity experts to coordinate response efforts.

10. Public Awareness Campaigns: Launch awareness campaigns to inform citizens about the dangers of disinformation and the tactics used by foreign actors. Highlight the importance of corroborating information from multiple credible sources.

11. Enhance Media Literacy: Develop and implement educational programs focused on media literacy at all levels of education. Teaching citizens how to critically evaluate information sources can empower them to recognize and resist disinformation.

12. Strengthen Independent Media: Support independent and fact-based journalism to promote credible news sources. Provide funding and resources to outlets that uphold high journalistic standards and counter false narratives.

Zašto nerešen status naftne industrije ugrožava nacionalnu bezbednost Srbije?

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Poslednji u nizu izazova po energetsku bezbednost Srbije nastupio je uvođenjem sankcija prema Naftnoj industriji Srbije (NIS) zbog prisustva ruskog vlasništva. Sankcije NIS-u uvedene su 10.januara 2025.godine. Od tog trenutka Srbija je u poziciji da mora da zaštiti svoju ekonomiju od procesa na koje nema uticaj. NIS je samo jedno od 400 spornih entiteta koje su sankcionisale SAD tog 10. januara. Važno je da sankcije nisu ciljane i usmerene ka Srbiji. NIS čini 7% srpskog BDP-a. Zbog ruskog vlasništva ugrožena je srpska ekonomija i očekivano je da država preduzme akciju u pravcu zaštite ekonomske, energetske i nacionalne bezbednosti. Opasnost od sankcija prema NIS-u postoji od 24.2.2022.godine i nije novost. Tokom prethodne tri godine nije se ništa preduzelo kako bi se eliminisao rizik koji je posledica ruskog vlasništva. U prethodnih 30 dana propuštena je prilika da se ovaj problem reši. Još maja 2022.godine Gasprom se suočio sa sankcijama, a sam NIS na udaru EU. Dugoročno neodrživa pozicija dodatno je ugrožena američkim paketom sankcija. Oktobra 2023.godine počelo je preispitivanje oko sankcija NIS-u. Bitno je imati na umu da je NIS nemerljiv resurs srpske ekonomije i da je neophodno pronaći rešenje kako bi se rizik od negativnih posledica usled primene sankcija smanjio. Zvanični Vašington je dugoročno zainteresovan za stabilnost Srbije i Zapadnog Balkana i zbog toga je u zadnji čas produžen rok kako bi se sprečio kolaps srpske ekonomije. Od 400 sankcionisanih entiteta 10.januara 2025.godine nikome nije produžen rok za prilagođavanje sankcijama. 26.2.2025. godine OFAK je izdao posebnu licencu JANAF-u i NIS-u kako bi se obavili poslovi koji su sklopljeni pre stupanja sankcija na snagu. Licenca je ponovo izadata za narednih 30 dana i važiće do 28.4.2025.godine dokle će NIS moći neometano operativno da posluje. Ta licenca ne predstavlja

odlaganje sankcija, što se često pogrešno predstavlja u javnosti, već je vreme za kredibilan plan po kome treba da se promeni vlasništvo i završe poslovi sklopljeni pre 10.januara. U predviđenom roku Srbija treba da pripremi ostvariv plan koji će priložiti OFAK-u. Tokom realizacije tog plana NIS će funkionisati redovno dokle god se plan realizuje. Pitanje NIS-a više nije pitanje ni Rusije ni SAD već je pitanje odluka koje će doneti Srbija. Očigledno je da ruska strana ne želi da se odrekne kontrole nad NIS-om i neće se odreći energetskog monopola u Srbiji. Narčito je opasno što oko statusa NIS-a pregovaraju advokati koje plaća ruska strana. Sudbina energetske bezbednosti je prepuštena u opasne ruke, u ruke ruske strane, čiji interesi nisu istovetni interesima Srbije. Postoji bojazan da je Srbija iz nekomercijalnih razloga pristala da o sudbini energetske i ekonomske bezbednosti brinu oni koje plaća ruska strana. Srbija propušta ekonomsku priliku koja se ukazuje rešavanjem ruskog vlasništva u NIS-u. Po isteku perioda od narednih 30 dana, odnosno kada nastupi režim sankcija, NIS gubi vrednost i posledice nastupaju po srpsku ekonomiju. Postavlja se pitanje zašto Srbija ne razmatra nacionalizaciju kao krajnju meru iz nužde. Svaka država bi u cilju sprečavanja štete pristupila zaštiti nacionalnog interesa svim sredstvima. Odsustvom državne akcije po pitanju NIS-a šalje se loša poruka investitorima u pravcu toga da se ne odlučuje na osnovu komercijalnih interesa u ekonomskim i energetskim pitanjima. Ustav Srbije predviđa mogućnost donošenja zakona o nacionalizaciji. Postoji i ona argumentacija da nije moguće nacionalizovati NIS jer je posao sa Gaspromom posledica međudržavnog ugovora. Pravni eksperti i advokati su stanovišta da međudržavni sporazum nije prepreka nacionalizaciji. Zakon o energetici iz 2024.godine može poslužiti kao osnov za nacionalizaciju kroz institut hitnih mera koje predviđa. Najbitnije u ovom trenuktu je da postoji plan za promenu vlasništva koji će biti predat OFAK-u. Garancije da će rok za podnošenje plana biti produžen nakon 28.aprila ne posotje. Činjenica je da NIS ne može normalno da funkcioniše pod sankcijama. Posledice se odnose na platni promet i poslovanje sa bankama, upotrebu platnih kartica, nabavku usluga i proizvoda pa sve do nabavke goriva i rezervnih delova za rafineriju. U ovom trenutku mnoge kompanije ne žele da posluju sa entitetom pod sankcijama. U pogledu eventualnog ukidanja sankcija poslednju reč ima Kongres SAD. Takav postupak je dugotrajan i težak, a Srbija nema vremena na raspolaganju. Pitanje točenja goriva na beogradskom aerodromu je takođe problem zbog politike osiguravajućih kuća i međunarodnih avio prevoznika. Promena režima američkih sankcija neće biti, upravo su produžene za još godinu dana. Američki minsitar finansija Besnet najavljuje još

snažnije sankcije protiv Rusije. NIS pod sankcijama može izdržati 30 do 60 dana, što važi i za srpsku ekonomiju, a velikih dogovora i ukidanja sankcija neće biti u tako kratkom periodu. Podsećanja radi NIS je tražio odlaganje od 60 do 90 dana, a dobio je 30 dana, plus dodatnih 30 dana. Produženje roka nije promena politiku sankcija već dobra volja da se ostavi vreme da Srbija tehnički reši postojeći problem. Ako nastavimo sa analizom celokupne situacije oko Gasproma i NIS-a uviđamo da će pre ili kasnije doći do konflikta na relaciji Beograd-Moskva jer u ovom položaju Srbija je u „talačkoj" krizi. Građani će vremenom shvatiti koliko je velika razmera istorijske greške da se NIS ustupi ruskom partneru. Posebno je zanimljiva vrednost ustupanja NIS-a 2008.godine. Tada je čuveni Meri Linč procenio vrednost na 2,5 milijardi dolara bez imovine koja je kasnije pripala Rusiji za 400 miliona eura. Iz ovih podataka vidimo da dogovor sa Rusima nikada nije bio komercijalni posao. Kada se govori o pretnjama i opasnostima treba imati na umu da jedina šteta i pretnja dolazi od Rusije i njenih postupaka po pitanju NIS-a. Primera radi Nemačka je nacionalizovala 3 rafinerije i nastavila je da obavlja poslove sa Rusijom. Ukoliko ruski partner bude ignorisao pritiske i demonstrirao odsustvo „bratskog" odnosa sa Srbijom dugoročno će uništiti partnerstvo. Što se tiče važnosti NIS-a i Gasproma na Zapadnom Balkanu ne može se isključiti okolnost da je reč o mašini političkog uticaja. NIS u ruskim rukama je sa jedne strane generisao profit za rusku stranu, dok je sa druge verovatno postojala cela mreža uticaja. Postoji sumnja da je strana vlada, Rusija, manipulisala stavovima građana po pitanju spoljnopolitičke orijentacije. U tom slučaju govorimo o gubitku informacionog suvereniteta koji je narušen delovanjem ruskih informacionih operacija u našem javnom prostoru. Odbijanje Rusije da pokaže saveznički odnos prema Srbiji ukazuje da ona nastoji kreirati geopolitičko bojno polje od našeg energetskog sektora. Trudeći se da zadrži NIS Rusija nastoji da zadrži energetski monopol i netransparentan uticaj u Srbiji i na Zapadnom Balkanu. Nacionalizacijom NIS-a Vlada Srbije će pokazati da vodi računa o stabilnosti poslovnog okruženja i poslaće pozitivan signal stranim direktnim investicijama. Neizvesnost po pitanju statusa NIS-a odražava se na donošenje odluka da se investira u Srbiji. Sankcije NIS-u neće biti ukinute u narednom periodu, jedino što je izgledno tiče se produžetka roka za podnošenje plana za promenu vlasništva.

Uticaj energetske bezbednosti na nacionalnu bezbednost Republike Srbije

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Prirodni gas i rizik po nacionalnu bezbednost

Sve do izbijanja gasne krize nastale kao posledica pune invazije Ruske Federacije na Ukrajinu 2022, u Republici Srbiji se malo govorilo o energetskoj bezbednosti. Čak i retki koji su o toj temi govorili, naglašavali su da je Srbija apsolutno bezbedna kada se radi o gasnom snabdevanju iz razloga prijateljskih odnosa sa Rusijom koja je bila glavni snabdevač energentima. Međutim, već u prvim danima haosa nastalog na tržištu snabdevanja gasom, situacija je postala mnogo jasnija. Ovoga puta, u negativnom kontekstu po građane Republike Srbije. Naime, kada su cene gasa počele nekontrolisano da rastu na tržištu i kada su lanci snabdevanja postali ugroženi zbog protivpravnih ruskih razaranja suverene Ukrajine, u Srbiji se pojavila potreba za pripremanjem zaliha ovog energenta u jedinom podzemnom skladištu Banatski Dvor. Tada je međutim Ruski partner Gazprom koji je većinski vlasnik Naftne industrije Srbije (NIS) a samim tim i pomenutog skladišta, odbio da vlastima u Srbiji a time i građanima ustupi deo gasa u skladištu Banatski Dvor, zbog čega je Republika Srbija (RS)bila prinuđena da zakupi deo skladišta na teritoriji Republike Mađarske. Tada je moralo biti jasno svakome ko se na ozbiljan način u organima upravljanja bavio energetskom bezbednošću da je ona ugrožena, jer za početak nema ozbiljne definicije energetske bezbednosti koja u sebi ne sadrži deo koji se tiče posedovanja rezervi. Dakle, i pored postojanja gasnog skladišta na svojoj teritoriji, a zbog lošeg kupoprodajnog ugovora i krajnje ne partnerskog stava partnera iz Rusije, država je bila prinuđena da spas u novonastaloj energetskoj situaciji potraži na teritoriji druge države. Tek tada donosiocima odluka u Republici Srbiji postaje

jasno šta je energetska bezbednost i koliko je taj fenomen istovremeno važan za nacionalnu bezbednost i normalno funkcionisanje države i društva. Ovaj događaj je konačno razotkrio koliko je bila pogrešna odluka nekadašnjih vlasti u Republici Srbiji da većinski deo nacionalne energetske kompanije (Naftna industrija Srbije) prodaju partneru iz Ruske Federacije (RF) i koliko se nije vodilo računa u detaljima ugovora koji je može se reći sastavljen u isključivu korist ruskog partnera. Već tada, istraživači Centra za stratešku analizu gostujući u televizijskim emisijama preporučuju donosiocima odluka da je krajnje vreme da se energetska bezbednost posmatra na ozbiljan i pragmatičan način i da se uvrsti u Strategiju nacionalne bezbednosti. Nažalost naši apeli su ostali bez reakcije nadležnih sa jedne strane ali smo pretrpeli brojne kritike i verbalne napade da želimo da narušimo tradicionalne odnose sa ,,bratskom" Rusijom. Kada se Evropa konsolidovala i zajedno sa ostalim partnerima iz demokratske zajednice krenula da uvodi ekonomske sankcije Ruskoj Federaciji naš Centar je upozoravao da je samo pitanje trenutka kada će se pod sankcijama naći i Naftna Industrija Srbije zbog činjenice da je njen većinski vlasnik kompanija iz Ruske Federacije. I tada naše analize i javni nastupi nisu uspeli da navedu donosioce odluka da na malo ozbiljniji način shvate energetsku bezbednost i moguće posledice narušavanje iste.

Tri godine kasnije (2025) Republika Srbija ponovo ima ozbiljnu pretnju ugrožavanja nacionalne bezbednosti zbog pomenutog ugovora sa Gazpromom iz 2008. Naime Uprava za Trezor Sjedinjenih Američkih Država poslala je upozorenje vlastima u Srbiji da namerava da uvede sankcije Naftnoj Industriji Srbije kao deo paketa mera kojima se ograničava prisustvo ruskog kapitala van granica Ruske Federacije. Dakle dešava se scenario na koji smo upozoravali na samom početku potpune agresije Rusije na Ukrajinu. Potezi koji se mogu videti korišćenjem otvorenih izvora, a koje je povlačila Vlada Republike Srbije ukazuju na potpunu ne pripremljenost za ovakav scenario bez jasne strategije i akcionih planova predviđanih za ovakvu situaciju. Jedino rešenje privremenog karaktera koje je dospelo u javnost bila je molba Vlade Republike Srbije da se primena sankcija odloži 90 dana kako bi se iznašlo rešenje. Na molbu je odgovoreno davanjem roka od 30 dana da se situacija oko vlasništva nad kompanijom promeni, odnosno da se Ruska strana odstrani iz vlasništva. Ne treba biti posebno analitički obrazovan da bi se zaključilo da je molba poslata u nadi da će promenom administracije u Vašingtonu možda doći do nekakvog globalnog dogovora Amerike i Rusije kojim bi prestale sve sankcije prema Ruskoj Federaciji pa time i ove predviđene Naftnoj Industriji Srbije. Nažalost, ovo samo ukazuje da trenutno ne postoji adekvatan plan

zaštite energetske bezbednosti Republike Srbije i njenih nacionalnih interesa kroz prizmu energetike ali i da se svesno produžava ugovor koji je štetan od samog potpisivanja i koji kao što se vidi sa sobom iznova i iznova nosi velike rizike po energetsku bezbednost a samim tim i nacionalnu bezbednost Republike Srbije. Sa druge strane, izostala su bilo kakva saznanja o rešenjima koje je ponudio ruski partner što samo ukazuje da ih ili nije ponudio ili je odbio rešenja koja je ponudila Vlada Republike Srbije. U ovom konkretnom slučaju počinjena je katastrofalna greška kada se radi o energetskoj bezbednosti. Problem koji je nastao 2022 godine gasnom krizom je eskalirao u problem sa istim uzročnikom u vidu ruskog kapitala u NIS, koji preti da dovede u pitanje ne samo snabdevanje gasom, već i snabdevanje naftom i naftnim derivatima jer je u vlasništvu NIS i jedina rafinerija nafte u Pančevu kao i niz različitih postrojenja. Primena sankcija u nepripremljenom ambijentu dovela bi do poremećaja lanaca snabdevanja na teritoriji cele Srbije zbog monopolističkog položaja kada se radi o gasu ali i većinskog udela u snabdevanju naftnim derivatima na teritoriji Republike Srbije. Važno je napomenuti da NIS i Gazprom na teritoriji Republike Srbije imaju 327 benzinskih stanica od ukupno 1526 prema evidenciji Ministarstva trgovine od 2025.godine ili kao glavni konkurenti(Knez Petrol, Lukoil, Eko i OMW) zajedno. Ova činjenica, kojoj treba dodati da su benzinske stanice NIS tako pozicionirane da snabdevaju većinu građana Srbije samo daje na značaju problemu ugrožavanja energetske bezbednosti Republike Srbije u slučaju ne pripremljenosti na vanredne situacije kojima NIS kao većinski učesnik u snabdevanju građana može biti izložen. Pri tome, problemi sa NIS osim sankcija demokratskih država zbog ruske agresije na Ukrajinu mogu biti i iz drugih razloga koji se izučavaju kroz faktore energetske bezbednosti u 21 veku.

Jedan od ključnih faktora kada se proučava energetska bezbednost je svakako dobavljač energenata. Do početka ruske agresije na Ukrajinu jedini dobavljač gasa za tržište Republike Srbije bila je Ruska Federacija. Ova činjenica ne sme biti pravdana time da je situacija u Evropi bila mirna. Čak i u situaciji večnog mira i harmonije, imati jednog dobavljača za bilo koji proizvod a naročito za gas koji predstavlja ne samo energent već i političko oružje kojim se može vršiti uticaj, pritisci i ucene je u najmanju ruku neodgovorno. Da li je takva situacija nastala nemarom ili pak svesno od strane onih koji su bili dužni da je spreče ostaje da se utvrdi. U svakom slučaju, kada imate jednog dobavljača energenta indeks energetske bezbednosti je ravan nuli, odnosno, država se smatra energetski nebezbednom. Kada se tome doda da je taj snabdevač ujedno i većinski vlasnik nalazišta gasa na domaćoj

teritoriji, odnosno u Republici Srbiji, kao i većinski vlasnik već pomenutog i jedinog gasnog skladišta, tada se može reći da je Republika Srbija ne samo sa niskim indeksom energetske bezbednosti kada se radi o prirodnom gasu, već da je njena energetska a samim tim i nacionalna bezbednost ozbiljno ugrožena. Kada se radi o gasnim skladištima, u Strategiji razvoja energetike Srbije do 2040 opredeljeno je čak 250 miliona evra za proširenje kapaciteta skladišta Banatski dvor i izgradnju novog u Itebeju. Postavlja se logično pitanje, zbog čega bi Srbija ulagala u nešto nad čim nema većinsku kontrolu, već je ima ruski partner?

Ovde se postavlja legitimno pitanje, zbog čega nadležni koji su odgovorni za vođenje energetske politike nisu ranije pokušali da izvrše gasnu diversifikaciju i pokušaju da pronađu alternativne dobavljače? Do 2024 Srbija je imala samo dve ulazne tačke za gas, jednu preko Mađarske, a drugu Balkanskim tokom. Jedno logično pitanje konstantno visi u vazduhu a to je zašto se godinama kasnilo sa izgradnjom gasnog interkonektora Niš-Dimitrovgrad kojim se gasna mreža spaja sa gasovodom kojim se doprema gas iz Azerbejdžana ali se istovremeno može kupovati i od Turske kao i konvertovani gas iz Grčke luke Aleksandropolus u koju stiže tečni gas iz Amerike ali ga može primati iz celog sveta. Ukoliko pogledamo najzastupljeniju metodu za merenje energetske bezbednosti poznatu kao Shannon-Wiener indeks, koja se bazira na stepen diversifikacije i deo tržišta koji dobavljači zauzimaju, videćemo od kolikog je ovaj gasni koridor značaja za nacionalnu bezbednost Republike Srbije posmatranu kroz prizmu energetske bezbednosti. Ova gasna konekcija urađena je tek nakon pritiska Evropske Unije kao i njenim većinskim finansiranjem. Ukupna vrednost gasnog interkonektora Niš – Dimitrovgrad – Bugarska je 85,5 miliona evra, od kojih Evropska investiciona banka (EIB) kreditira 25 miliona evra, 49,6 miliona je bespovratno sufinansiranje Evropska unija iz pristupnih IPA fondova, dok će se ostatak troškova pokrivati iz budžeta Srbije i sredstava javnog preduzeća Srbijagas . Sama konekcija ima mogućnost da Srbija njome zadovolji čak 60 procenta svojih potreba i tako se reši zavisnosti od Ruske Federacije i sebi značajno podigne nivo energetske nezavisnosti i nacionalne bezbednosti. Ovo pogotovo ima značaj kada se uzmu i više nego dobri odnosi Republike Srbije i Azerbejdžana, stabilnost te države kao i za razliku od Ruske Federacije, ne mešanje u unutrašnja pitanja. Ovo je verovatno i odgovor zbog čega se ova gasna ruta ne koristi u potpunosti. Dodatni plus koji bi Srbija mogla da ima koristeći ovaj gasovod u potpunosti je i mogućnost razvijanja gasne infrastrukture na južnom delu svoje teritorije gde se u velikoj većini domaćinstava i dalje koriste drva

i ugalj za grejanje čime se znatno utiče na zagađenje vazduha. Osim toga, razvijanjem gasne infrastrukture na jugu Srbije stekli bi se uslovi za industrijalizaciju i privlačenje stranih direktnih investicija čime bi se sprečilo migriranje stanovništva iz ruralnih sredina u prenatrpane gradove i podigao životni standard ne samo tog dela već i cele Republike.

Dakle, korišćenjem gasne konekcije sa Bugarskom, dobija se mogućnost nabavke gasa iz više izvora kao preko dodatne rute čime se znatno podiže nivo energetske bezbednosti Republike Srbije. Na ovaj način, gas se doprema iz država koje nemaju političke probleme kao što Ruska Federacija ima međunarodne sankcije što i prema Indexu energetske sigurnosti (Energy Security Index) značajno utiče na energetsku bezbednost.

Rezime i preporuke

Republika Srbija trenutno ne može da se u potpunosti oslobodi ruskog gasa koji je ova država evidentno koristila kao metod uticaja i pritiska na celokupno srpsko društvo. Čak i da se izvrši nacionalizacija Naftne Industrije Srbije ili da udeo ruskog partnera otkupi treća strana ostaje potreba za 40 procenata gasa koja se u ovom trenutku može zadovoljiti jedino iz Ruske Federacije. Međutim korišćenjem punog kapaciteta novootvorene gasne konekcije sa Bugarskom, većina gasa se može nabaviti iz različitih izvora koje karakterišu stabilnost političkih sistema kao i sigurnost isporuke, čime se uticaj i pritisak Moskve mogu u velikoj meri smanjiti. Ukoliko se to kod donosioca odluka prepozna kao interes. U sklopu mera za podizanjem energetske bezbednosti kada se radi o gasu, svakako se moraju raditi pregovori o povezivanju na gasovode čija se izgradnja planira u bliskoj budućnosti u regionu. Srbija može da ponudi investitorima da bude partner u izgradnji ili da unapred rezerviše po povoljnim cenama određene količine. Jedna od najizvesnijih mogućnosti je povezivanje na gasovod finansiran od strane Izraela, Kipra i Grčke a čija trasa prema preliminarnim planovima treba da se završi u Italiji prolazeći prethodno kroz Albansku luku Drač. Do tada, Republika Srbija može da kupuje kiparski gas preko luke Aleksandropolus u Grčkoj a koji se prema sporazumu Republike Kipar i Egipta iz Februara 2025 prethodno obrađuje u Egiptu i distribuira dalje kupcima. Jedan od načina suzbijanja Ruskog uticaja putem gasa je i kupovina izraelskog gasa koji će ova zemlja podvodnom infrastrukturom dopremati do Egipta odakle će se transportovati do luka u EU na osnovu sporazuma iz Kaira 2022, gde opet se pojavljuje Grčka luka Aleksandropolus kao jedan od bitnijih faktora. U tom kontekstu, Republika Srbija bi morala da sa partnerima (Bugarska i Grčka)

radi na hitnom povećanju kapaciteta od pomenute luke do inter konektora između Srbije i Bugarske. Osim ovih preporuka, najvažnija je da se izvrši ili nacionalizacija NIS na šta Republika Srbija ima pravo jer su joj ugroženi nacionalni interesi ili da se u slučaju izostanka američkih sankcija prema NIS, napravi revizija ugovora kojom bi se Srbiji ustupilo pravo prečeg korišćenja gasnog skladišta Banatski Dvor. Takođe, revizija ugovora bi morala da obuhvata i potencijalna mesta za izgradnju novih gasnih skladišta, koja su takođe katastrofalnom odlukom bivših vlasti u Srbiji sada u većinskom vlasništvu ruskog partnera. Ukoliko se to kod donosioca odluka prepozna kao interes. Sve u svemu, ukoliko donosioci odluka odluče da se reše ruskog uticaja čime bi podigli nivo energetske bezbednosti, potrebno je uraditi dugoročno strateško planiranje koje bi uključilo navedene države i kroz različite vrste partnerstava sprovesti plan što je svakako preporuka naročito ukoliko se uzmu u obzir podaci iz Strategije razvoja energetike Srbije koji pokazuju da i pored predviđanog razvoja obnovljivih izvora energije, prirodni gas će i 2040 imati ključnu ulogu u Srbiji kada se radi o proizvodnji električne energije. Pojedini od predloga za diversifikaciju i smanjivanje ruskog gasnog uticaja se mogu videti i u Strategiji razvoja energetike sa sve kalkulacijom troškova tako da je sada sve u rukama donosioca odluka.

Nafta i naftni derivati kao rizici za nacionalnu bezbednost

Situacija sa naftom i naftnim derivatima je u velikoj meri slična sa gasom. Jedina naftna rafinerija nalazi se u Pančevu i deo je NIS, dakle i nad njom ruski partner ima većinsko vlasništvo. Iako NIS ima u svom posedu oko 20 procenata benzinskih stanica u Srbiji, njegov uticaj je znatno veći od tog procenta jer veliki broj malih preduzetnika (više stotina stanica) gorivo kupuje upravo od Rafinerije NIS dok samo međunarodni lanci gorivo koje prodaju na svojim pumpama uvoze iz EU, što ih ne sprečava da kada im zatreba isto to kupuju iz rafinerije NIS.Dakle, ukoliko se primeni bilo koji od indexa kojima se računa energetska bezbednost, može se reći i da je u slučaju nafte i naftnih derivata, indeks energetske bezbednosti na dosta nezavidnom nivou. U slučaju bilo kakve havarije u rafineriji koja je u većinskom vlasništvu ruskog partnera, ili striktnoj primeni strožijih sankcija, postoji realna opasnost da benzinske stanice kojima se snabdeva većina stanovništva i privrede u Republici Srbiji ostanu bez goriva, što bi dovelo do snažnih poremećaja u lancima snabdevanja i normalnom funkcionisanju srpskog društva. Još jedan razlog više da donosioci odluka ozbiljno razmisle o modalitetima

odstranjivanja ruskog kapitala iz NIS. Lošem indexu energetske bezbednosti doprinosi i činjenica da se rafinerija u Pančevu snabdeva isključivo naftom iz jednog jedinog pravca, naftovodom JANAF od luke Omišalj na Hrvatskom ostrvu Krk. Bilo kakva kriza na tom više od 700km dugom naftovodu može dovesti do ozbiljnog ugrožavanja energetske bezbednosti u Srbiji. Da bi se ova situacija izbegla, Srbija namerava barem prema izjava zvaničnika, da zajedno sa Mađarskom izgradi naftovod kojim bi se povezala na naftovod Družba, kojim se u Evropu doprema ruska nafta. Za Srbiju je ovo novčano najjeftiniji način da dođe do još jednog kanala snabdevanja, ali postavlja se pitanje zavisnosti od ruske strane koja će u tom slučaju biti maksimalna. Na ovaj način Republika Srbija u stvari nastoji da zaobiđe sankcije Američke administracije i zaštiti ruskog partnera, umesto da svoj interes stavi u prvi plan. Finansiranje naftovoda da bi se ruskom partneru omogućilo dalje poslovanje i izbegavanje sankcija Amerike kao i da bi se ne ruska nafta zamenila ruskom, zaista se graniči sa veoma lošim strateškim predviđanjem.

Rezime i preporuke

Republika Srbija ima mogućnost da sagradi svoju rafineriju u sto procentno državnom vlasništvu i time sebi obezbedi trajnu stabilnost kada se radi o nafti i naftnim derivatima. Ta rafinerija može podstaći konkurentnost na tržištu, može proizvoditi mnogo kvalitetnije gorivo uz poštovanje najviših svetskih standarda ali i otvoriti nova radna mesta. Takođe, ta nova rafinerija se može izgraditi u partnerstvu sa kompanijama koje svoje sedište imaju u demokratskim državama kojima ne prete nikakve sankcije.

Ali i ovaj scenario najavljivan za Smederevo opet predstavlja veliki utrošak u samom startu. Za državu Srbiju, mnogo jeftinija i brža solucija je zamena ruskog partnera u NIS nekim od zapadno evropskih ili američkih partnera čime bi se još više ojačale veze sa blokom demokratskih zemalja i što bi nepovratno trasiralo put Srbiji ka istim.

Priključivanje na naftovod Družba, predstavljao bi samo prividnu diversifikaciju koja vodi ka stabilnom snabdevanju jer se stvara još jedna ruta kojom se nafta doprema do rafinerije u Srbiji što u normalnim okolnostima predstavlja značajan pomak, međutim u ovom slučaju ostaje problem zemlje izvora tj. veze sa Ruskom Federacijom zbog čega je cela situacija i nastala. Ukratko, Srbija mora da se reši veze sa ruskim kapitalom kada se radi o nafti i naftnim derivatima, bez obzira da li je u pitanju njihovo poreklo, da li se koriste ruski naftovodi ili je prisutan ruski kapital u srpskoj rafineriji i naftnoj industriji.

Nuklearna energija kao rizik za nacionalnu bezbednost

U Srbiji je krajem 2024. godine prestao moratorijum na izgradnju nuklearnih elektrana. Od tadase u javnosti dosta govori o ovoj temi. Pred Srbijom je jednostavan izbor. Hoće li graditi tradicionalnu nuklearnu elektranu za šta je potrebno desetak godina i više od 15 milijardi evra ili da se pristupi instaliranju malih modularnih reaktora o kojima je državni vrh više puta govorio. I u jednom i u drugom slučaju, projekat nuklearne energije osim što bi Srbiji obezbedio trajno i jeftino snabdevanje (ukoliko isključimo inicijalno ulaganje) može joj obezbediti i značajno strateško partnerstvo. I to ne bilo kakvo strateško partnerstvo, već ono koje zbog značaja teme može predstavljati najvažniji element energetske a samim tim i nacionalne bezbednosti Republike Srbije. I upravo tu izgleda leži glavna nedoumica donosioca odluka u Srbiji. Koga izabrati za partnera? Racionalna analiza nakon pročitanih prethodnih redova kaže, svakoga samo ne Rusiju. Rusija kao partner je pogrešan izbor iz više razloga.

Prvo, kao što je prethodno prikazano, Srbija se već nalazi u prevelikoj i realno nedopustivoj energetskoj zavisnosti od Ruske strane. Izgradnja nuklearne elektrane sa Ruskim partnerom, građane Srbije bi pretvorila u energetske robove Kremlja.

Drugo, Rusija je trenutno pod sankcijama demokratskog sveta zbog oružane agresije na susednu zemlju, članicu UN kojoj je ta ista Rusija garantovala bezbednost nakon što joj je Ukrajina predala svoj nuklearni arsenal ostao raspadom Sovjetskog Saveza. Dakle, može li im se uopšte verovati kada su ozbiljni ugovori u pitanju?

Treće, ukoliko pogledamo retoriku ruskih funkcionera, ako uzmemo u obzir da je Ruska privreda prebačena na ratni režim, ako analiziramo nastupe na njihovoj državnoj televiziji, niko ne može reći da Rusija ne namerava da napadne i neku drugu državu kao što je Moldavija, Gruzija ili neka od Baltičkih država. Njihova hibridna dejstva, inicijalno stvorena od strane ozloglašenog KGB kao ,, aktivne mere“ razaraju demokratiju gde god se ona pojava u državama nekadašnjeg Varšavskog ugovora ali i bivše Jugoslavije. Iz navedenog može se zaključiti da je pitanje ukidanja sankcija vrlo upitno, vraćanje poverenja još više. I na kraju, šta ako im ponovo budu zavedene sankcije?

Četvrto, posledica sankcija i privrede na ratnom režimu je svakako zaostajanje u nauci i savremenim tehnologijama u svim sferama pa i nuklearnoj.

Nameće se zaključak da zbog toga ruski naučnici gube korak sa zapadnim kolegama.

Peto, vrlo praktično pitanje je pitanje održavanja složenog sistema ukoliko se desi bilo koji od navedenih scenarija.

Šesto, ukoliko bude viška energije iz nuklearne elektrane a Rusija bude pod sankcijama ili je jednostavno bude pratio loš glas kao danas, hoće li bilo ko iz našeg okruženja hteti da kupi jedan jedini kilovat u čijoj proizvodnji učestvuje ruska strana?

Rezime i preporuke

Budućnost Republike Srbije koja nastoji i uspeva da privuče što više inostranih kompanija i kapitala u velikoj meri zavisi od energetskih kapaciteta. Nema privrednog razvoja bez energije i Srbija je toga svesna. Svesna je i strateškog opredeljenja izborom partnera za gradnju nuklearne elektrane. Ko bude partner Srbiji u ovom projektu, taj će trasirati put njene budućnosti. Na donosiocima odluka je jednostavan izbor, ići putem demokratije i opšteg razvoja realizacijom projekta sa Norveškom (modularni reaktori) ili Amerikom, Francuskom i sl. kada su u pitanju tradicionalne nuklearne elektrane ili pak ići putem samo izolacionizma i diktature izborom Ruske Federacije za partnera uz veliku neizvesnost po pitanju kvaliteta i održavanja. Naravno ne sme se zaboraviti ni segment uštede jer bi se upotrebom nuklearne energije značajno smanjila potrošnja uglja, što dovodi do dekarbonizacije, smanjivanja broja respiratornih oboljenja, uticaja na životnu sredinu. Takođe, smanjila bi se i upotreba gasa, a samim tim i zavisnosti od političkog uticaja Rusije.

Energija vetra i solarna energija kao rizik za nacionalnu bezbednost

Strategijom razvoja energetike u Srbiji, najveći rast proizvodnje energije predviđen je upravo iz ovih izvora. Ministarstvo energetike predviđa da će ukupan udeo energije proizveden na ovaj način 2040 godine biti čak oko 40 procenta, odnosno da će proizvodnja energije iz solarnih polja u narednih 15 godina biti 15 puta veća, a energija dobijena iz vetra 4 puta veća. S obzirom da ovde imamo situaciju sličnu kao sa gasom pre 20 godina kada se krenulo sa masovnom gasifikacijom u Srbiji, ne sme se dozvoliti stihijsko i neplansko uvođenje inostranih partnera, kako ne bi smo upali u zamku zavisnosti kao u slučaju sa gasom. Tačno je da će i solarna polja i vetroparkovi fizički biti u Srbiji, ali proizvedena energija će biti u rukama njihovih vlasnika onoga trenutka kada se na tržištu budu pojavile baterije dovoljno velikih kapaciteta u kojima bi se mogla skladištiti.

Hidroenergija i rizik za nacionalnu bezbednost

Kao što se može videti u Strategiji razvoja energetike, hidroenergija ima značajnu ulogu u snabdevanju energijom u Srbiji. Zahvaljujući ovako dobijenoj energiji smanjuje se energetska zavisnost od uvoza. Ono što nam svakako nedostaje u Republici Srbiji je povećanje tih kapaciteta. Pri tome, ukoliko je dakle poznata činjenica da se ovako dobijenom energijom jača energetska bezbednost i smanjuje zavisnost od drugih država, mora se voditi računa o odabiru partnera sa kojim bi se neka nova hidro centrala gradila. Za Srbiju bi u tom smislu najbolje rešenje bilo da se gradi Đerdap 3 sa Rumunijom bez uplitanja bilo kog partnera sa naše strane ukoliko postoje finansijski uslovi kao i tehničke mogućnosti u smislu izvođača radova ali i kadrova koji bi po završetku izgradnje vodili posao. Dakle klasičnim komercijalnim kreditom. Ukoliko to nije slučaj, treba se voditi principom kao i u slučaju moguće izgradnje nuklearne elektrane sa takvim odabirom partnera koji bi Srbiji bio i ulaz u strateško partnerstvo sa državom iz koje partner dolazi, pri čemu zbog već prisutne zavisnosti treba izbegavati Rusku Federaciju ali i Kinu kod koje je Srbija već dosta zadužena na osnovu međudržavnih sporazuma kojima se finansiraju infrastrukturni projekti, ali i zbog odnosa EU i SAD prema kineskim investicijama. Srbija ne sme dozvoliti da bilo kojim postupkom ugrozi svoje pristupne pregovore sa Evropskom Unijom ili energetski sporazum sa SAD.

Vrlo značajna činjenica u Strategiji je i to da izgradnja hidroelektrane na reci Drini koja predstavlja granicu sa BiH u velikoj meri zavisi od dogovora među entitetima u toj državi. Ovde možemo videti koliko je važno da Srbija kao garant Dejtonskog sporazuma održava dobre odnose sa svim stranama u BiH i koliko to može imati efekta na običnog građanina sa obe strane Drine. Izgradnjom hidroelektrane na Drini u velikoj meri bi se povećala stabilnost snabdevanja u tom delu Srbije i Bosne i Hercegovine čime se direktno utiče na kvalitet života svih, a samim tim i nacionalnu bezbednost.

Energetska bezbednost u strateškim dokumentima

Iako očigledno energetska bezbednost predstavlja jedan od osnova nacionalne bezbednosti zbog uloge energije u svakodnevnom životu, njoj u strateškim dokumentima nije posvećena zadovoljavajuća pažnja. Poslednji strateški dokument koji je donet a u kome se spominje Energetska bezbednost je Strategija razvoja energetike Republike Srbije do 2040 godine sa projekcijama do 2050 godine koju je usvojila Narodna Skupština Republike Srbije na sednici održanoj 27. Novembra 2024.

U ovom dokumentu koji predstavlja sve ono što treba uraditi na polju energetike do 2040 godine, ključne stvari vezane za energetsku bezbednost se spominju nedovoljno, moglo bi se reći politički korektno ali svakako ne proaktivno, što ostavlja mogućnost za nedovoljno precizne akcione planove kojima se strategija treba sprovoditi odnosno za Program ostvarivanja strategije (POS), i mere za njihovo ostvarivanje. Sa druge strane, mora se reči da dokument može biti dobra polazna osnova za buduću Strategiju nacionalne bezbednosti koja bi trebalo da na jedan objektivan i pre svega u interesu Republike Srbije adekvatan način tretira energetsku bezbednost.

Dokument na početku iznosi tvrdnju da je za energetsku bezbednost Srbije od ključnog značaja dekarbonizacija Srbije sa prelaskom na obnovljive izvore energije. Ali se nigde ne spominje da proizvodnju iz obnovljivih izvora treba tako koncipirati da ni jedan strani partner nema većinski uticaj kao što je to prethodno opisano u slučaju gasa i nafte i naftnih derivata. Takođe u dokumentu se navodi da se promene koje će se dešavati na polju energetike biti usaglašene sa strateškim dokumentima i aktivnostima u različitim oblastima, ali se nigde ne spominju strateški dokumenti vezani za nacionalnu bezbednost Srbije, čije su promene najavljene iz državnog vrha. Ostaje pitanje zbog čega se, ako se nije insistiralo, ono bar spomenulo da energetska bezbednost treba da bude sadržana u tim dokumentima.

U delu 4.1 na samom kraju kada se radi o energetskoj bezbednosti u svega dve rečenice, opisana je trenutna situacija sa gasom i dato negativno mišljenje o dobijanju gasa iz samo jednog izvora. Pri čemu se u tabelarnom prikazu može videti kolika je gasna zavisnost u proizvodnji toplotne energije gde je gas u 2025 godini prisutan sa čak 85 procenata ! U istom tabelarnom prikazu prikazano je vrlo optimističan rast ostalih energenata tipa bio masa, toplotne pume i solar ali je i dalje gas u tim predviđanjima za 2040 na visokih 50 procenata. Nažalost, nije se odmaklo dalje od toga u smislu predlaganja o novim pravcima snabdevanja ili dobavljačima o čemu je bilo govora u prethodnim delovima ove analize. O tome možemo u vidu predloga nešto više saznati u odeljku 7.5 uz adekvatnu konstataciju o potrebi gasne diversifikacije ali uz nedovoljnu korelaciju sa nacionalnom bezbednošćo, što može biti i opravdano jer se ipak radi o dokumentu iz čisto energetskog ugla.

Ukupan utisak je da dokument nastoji da omogući značajan razvoj obnovljivih izvora energije (OIE), što je svakako za pohvalu kao i tendencija ka dekarbonizaciji, ali se postavlja pitanje da li Srbija treba da bude energetski talac Ruske Federacije do tada? Do 2040 ili 2050 za kada se pretpostavlja da će dekarbonizacija korišćenjem OIE preovladati.

U delu 5.2 u kome se govori o proizvodnji nafte i gasa, čitalac bi lako mogao da zaključi zbog čestog spominjanja epiteta ,, domaća proizvodnja " da je to zaista tako, jer se nigde ne navodi da je ruski partner većinski vlasnik sve nafte i gasa koji se proizvedu na teritoriji Republike Srbije. Realniji termin bi bio ,,proizvodnja na teritoriji Republike Srbije". Naravno, nigde nema ni pomena o tome da to loše utiče na energetsku bezbednost Republike Srbije. Takođe prilikom nabrajanja ciljeva energetske politike, nigde se ne spominje diversifikacija izvora snabdevanja kada se radi o gasu niti se igde spominje mogućnost smanjivanja zavisnosti od ruskog gasa iako se u dokumentu najavljuje izgradnja novih gasnih elektrana u Novom Sadu i Nišu.Uglavnom, stiče se utisak čitajući dokument da se energetska bezbednost tumači previše usko, isključivo kroz domen snabdevanja u smislu kvaliteta i kontinuiteta, ne uzimajući u obzir reperkusije po nacionalnu bezbednost a samim tim i društvo uopšte. Uz mali izuzetak kada se u jednom delu govori o isključivo mogućnosti a ne o nameri da se gas u Srbiju doprema iz većeg broja država. Koji su razlozi za ovakav pristup ostaje nepoznanica, ali svakako da je jedan od najvažnijih taj što trenutna Strategija nacionalne bezbednosti ne prepoznaje značaj energetske bezbednosti.

Ukoliko bi se donošenjem nove Strategije nacionalne bezbednosti jasno definisalo kakvu ulogu ima energetska bezbednost i u kom pravcu se energetika treba razvijati u smislu da bude jedan od stubova nacionalne bezbednosti, tada bi smo mogli očekivati da i sama Strategija energetskog razvoja bude još konkretnija sa više akcionih planova i zaista sa svrhom.

Strategija nacionalne bezbednosti yxi energetska bezbednost

Poslednja Strategija nacionalne bezbednosti Republike Srbije doneta je 27.12.2019 godine. Već tada, brojni bezbednosni i ekonomski poremećaji su bili prisutni u širem okruženju i morali su biti razmatrani prilikom njenog sastavljanja. Umesto toga u njoj je samo navedeno da će se potražnja za naftom i gasom nastaviti i povećati. Čak se i ne spominje, odnosno ne predviđa dekarbonizacija, već se naglasak stavlja na dominantnost fosilnih goriva, iako je već tada tendencija ka dekarbonizaciji bila nova realnost Evropske Unije ka kojoj Srbija deklarativno teži. Sve uz tvrdnju da će energija iz obnovljivih izvora malo verovatno uvećati svoj procent u globalnoj potrošnji. Sa današnje pozicije, naročito nakon usvojene Strategije razvoja energetike Republike Srbije totalno pogrešno i kratkovido.

Jedina realnost vezana za energetsku bezbednost koja je prikazana u Strategiji pre 6 godina je navođenje ograničene mogućnosti uvoza i skladištenja energenata i da to može uticati negativno na energetsku bezbednost. Ovo bi moglo biti i dovoljno da se nešto ozbiljnije preduzelo da se takva situacija promeni naročito kada se radi o skladištenju gasa, ali i izbegavanju monopola u snabdevanju tržišta naftom i naftnim derivatima. Podsetimo se, i sama diversifikacija nabavke gasa koja je sprovedena tek 5 godina nakon donošenja strategije, nije u potpunosti zadovoljavajuća.

Može se slobodno reći da ne postoji logičko objašnjenje iz kog razloga energetska bezbednost nije dovoljno zastupljena u Strategiji nacionalne bezbednosti ili zbog čega u prethodnih 6 godina nije došlo do njene izmene. Naročito ukoliko uzmemo u obzir poremećaje na tržištu izazvane ruskom agresijom na Ukrajinu sa jedne strane kao i pristup EU novonastalom problemu sa druge strane a sve kroz prizmu javno i zvanično deklarisane želje Republike Srbije da jednog dana pristupi EU. Nadamo se da bi potpisan energetski sporazum sa SAD morao da navede donosioce odluka u situaciju da obrate pažnju na to kako novi energetski partner posmatra energetsku bezbednost. A SAD tretiraju energetsku bezbednost veoma ozbiljno još od vremena administracije Predsednika Kartera kada su John Deutch direktor CIA, James Schlesinger Ministar odbrane koji je bio i prvi Ministar za energetiku napisali opširnu studiju o značaju energetske bezbednosti i njenom uticaju na nacionalnu bezbednost, tada posmatranu kroz naftu kao ključni energent tog doba. Pažljivim čitanjem navedene studije, opisani mogući scenariji poremećaja tržišta nafte i uticaja na nacionalnu bezbednost, mogu se ako ne preslikati na situaciju sa gasom, onda barem motivisati čitaoca da izvuče paralelu sa današnjom situacijom na tržištu gasa. Još tada su pomenuti autori govorili o značaju energenata na geopolitička kretanja i uticaju na nacionalnu bezbednost države.

Može se čuti mišljenje da u trenutku donošenja (2019) trenutno važeće Strategije nacionalne bezbednosti nije bilo ratnog sukoba na relaciji Rusija-Ukrajina, što jeste tačno. Međutim nije opravdanje jer je prva ozbiljna gasna kriza nastala mnogo pre oružanog sukoba, tokom 2005-6 godine oko cene gasa i tvrdnji Ukrajine da Rusija ne poštuje međudržavni ugovor o cenama i tranzitu gasa preko Ukrajinske teritorije. U tom trenutku bilo je dovedeno u pitanje snabdevanje gasom više država članica EU, i praktično od tada se u samoj Uniji mogu videti mišljenja o opasnosti koju sa sobom nosi zavisnost Unije od ruskog gasa.

Ne treba biti mnogo mudar pa izvesti zaključak da je Rusija znatno podigla cene gasa Ukrajini nakon što su na vlast u ovoj zemlji došli proevropski političari i da je taj potez bio vrsta kazne za bekstvo iz Kremljanskog zagrljaja. Konsekvenca nesporazuma sa Ukrajinom bila je smanjeni dotok gasa i brojnim EU državama, čime je Rusija želela da i samu Uniju kazni za podršku Ukrajinu i njeno udaljavanje od Moskve ali i da gas istovremeno iskoristi kao oružje ucene ne bi li ostvarili svoje geopolitičke ciljeve. Ovo je bio prvi primer korišćenja gasa kao oružja 21. veka i sekuritizacije ovog energenta. Tada je moralo biti jasno donosiocima odluka da energetska zavisnost ima nekoliko svojih dimenzija kojima utiče na energetsku a samim tim i nacionalnu bezbednost a koje je sada potrebno uzeti u obzir prilikom donošenja nove Strategije nacionalne bezbednosti Republike Srbije ali i Strategije spoljne politike koja će predstavljati novinu u strateškim dokumentima.

Prva dimenzija je svakako prirodno-tehnička koja se odnosi na rezerve nekog energenta na teritoriji Srbije. Kada se radi o nafti i gasu, rezerve gasa su vrlo male, nema mogućnosti povećanja proizvodnje i laici bi rekli da na njih ne treba previše obraćati pažnju, zbog čega su verovatno tako olako i ubačeni u kupoprodajni ugovor sa Ruskim partnerom. Ali , kao što je već prethodno opisano, taj mali broj gasnih i naftnih rezervi direktno uzrokuje na još manji broj mesta gde se gas može skladištiti, što je od izuzetne važnosti za energetsku i nacionalnu bezbednost. Sa druge strane, kada se radi o hidroenergiji, potencijali su veliki i mogu značajno uticati na poboljšanje energetske bezbednosti i zbog toga je potrebno voditi računa o izboru eventualnih partnera u njihovom korišćenju.

Sledeća dimenzija je ekonomska. Nesporna činjenica je da je gas trenutno najjeftiniji energent u Srbiji kada se radi o industriji, naročito ukoliko uzmemo u obzir emisiju štetnih gasova. Svi do jednog investitori koji su dolazili u Srbiju su za svoje proizvodne hale zahtevali priključak na gas. Pojednostavljeno, bez gasa nema investicija bez kojih nema radnih mesta niti punjena budžeta za socijalna davanja. Ukoliko imamo jednog dobavljača kod koga smo u gasnoj zavisnosti, on direktno svojim činjenjem preko količina, kvaliteta i cena utiče na našu ekonomiju. Jaka ekonomija je osnov zadovoljstva građana što je osnov stabilnosti jedne države. Dakle još jedan razlog više da se energetska bezbednost nađe u Strategiji nacionalne bezbednosti ali i da se pažljivo izabere partner za eventualnu izgradnju nuklearne elektrane koja proizvodi najjeftiniju energiju.

Konačno, poslednja dimenzija energetske bezbednosti i zavisnosti je neizostavno politička. Brojni su primeri od povećanja ili smanjivanja proizvodnje

nafte u članicama OPEK, preko Ruske trgovine gasom koliki politički uticaj imaju države monopolisti u trgovini energentima. Njihov uticaj polazi od svesnosti da su ekonomije mnogih država a samim tim i politički sistemi i elite koje upravljaju njima njihovi taoci u ovoj igri. Na taj način, korišćenjem energenata kao oružja pokušavaju da ostvare svoje geopolitičke ciljeve, grupišući upravo navedene vladajuće elite energetski zavisnih država, da budu njihovi nosioci uticaja u početku među domicilnim stanovništvom a nakon toga i van granica svoje zemlje prikazujući ih kao vrlo uspešne u sprovođenju ekonomske i socijalne politike ali i prijatelje onoga ko raspolaže energetskim resursima.

Zaključak kao preporuka

Prilikom donošenja poslednje Strategije nacionalne bezbednosti Republike Srbije očigledno nije izvršena procena energetske bezbednosti Republike Srbije na pravilan, objektivan način. Ovo se može zaključiti na osnovu vrlo šturog prisustva energetske bezbednosti u samoj Strategiji kao i tome da se i u tom kratkom delu ne vidi da se bilo ko bavio analizom mogućih scenarija narušavanja energetske bezbednosti i uticaja tako narušene energetske bezbednosti na nacionalnu bezbednost. Da se tako postupalo, u narednom periodu video bi se predlog odluka za unapređenje energetske bezbednosti zasnovan na Strategiji uz pozivanje na istu.

Ove nedostatke je svakako potrebno ispraviti prilikom donošenja nove Strategije nacionalne bezbednosti ili uvrstiti u novi dokument koji bi sa njom bio kompatibilan , odnosno u Strategiju energetske bezbednosti RS koja bi se na jedan sveobuhvatan način bavila ovom problematikom uz donošenje akcionih planova za sprovođenje.

Manipulativne kampanje i uticaj dezinformacija na javno mnjenje u oblasti energetske bezbednosti

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UVOD

Pojam energetske bezbednosti predstavlja značajan apsekt sveukupnih savremenih bezbednosnih izazova sa kojima se suočavaju moderne države. Energetska bezbednost je od suštinskog značaja za stabilnost i razvoj svake savremene države i Srbija u tom smislu nije izuzetak. Stanje i perspektive ovog aspekta nacionalne bezbednosti imaju višestruki značaj i direktno utiču na ekonomiju, unutrašnju i spoljnu politiku, kao i na međunarodne odnose zemlje. U pogledu **ekonomskog značaja**, pojam energetske bezbednosti predstavlja ključni faktor stabilnosti privrede. Pouzdano snabdevanje energijom je osnov za funkcionisanje industrije, preduzeća i domaćinstava. Problemi u energetskom sektoru mogu izazvati poskupljenja, odsustvo investicija, recesiju i gubitak radnih mesta. Takođe, značajni uticaj ovaj aspekt bezbednosti ima na cene energenata i inflaciju. Cena električne energije, gasa i nafte direktno utiče na troškove proizvodnje i životni standard građana, a nestabilnost u snabdevanju može dovesti do rasta inflacije i ekonomske nesigurnosti. Energetska sigurnost je ključna za privlačenje stranih investicija jer ulagači traže stabilne i predvidive uslove poslovanja. Ovo je posebno važno u uslovima stalno rastuće ukupne potrošnje energije što je ključno obeležje društava koja se ubrzano razvijaju i prelaze na digitalnu ekonomiju. S druge strane, nestabilnost može odvratiti investitore iz sektora industrije, infrastrukture i digitalne ekonomije. Takođe, Srbija ima potencijal za razvoj obnovljivih izvora (vetar, solarna energija, biomasa), što može smanjiti zavisnost od uvoza i doprineti dugoročnoj energetskoj stabilnosti zemlje.

Pored ekonomskog značaja pojam energetske bezbednosti zemlje ima nesumnjivi **politički značaj**. Pitanja energetske bezbednosti često se koriste kao deo političkih kampanja, a energetske krize mogu izazvati društvene nemire i destabilizaciju vlade zbog čega utiču na sveukupnu unutrašnja stabilnost političkog sistema. Takođe, stabilno snabdevanje energijom, pristupačne

cene i državne subvencije za energente direktno utiču na životni standard građana i njihovu podršku političkim akterima. S druge strane pitanja poput energetske tranzicije stvaraju politički otpor. Prelazak sa fosilnih goriva na obnovljive izvore energije (OIE) može izazvati otpor određenih interesnih grupa (rudarski sektor, industrija nafte i gasa), što može uticati na proces donošenja političkih odluka.

Pitanje energetske bezbednosti ima značajne implikacije na ukupne **međunarodne odnose i geopolitički aspekt.** U slučaju Srbije, prvi situacioni faktor jeste njena zavisnost od uvoza energenata. Srbija je značajno zavisna od uvoza ruskog gasa i nafte, što je čini ranjivom na globalne geopolitičke promene i potencijalne sankcije. Ovaj faktor bitno utiče na njene odnose sa Rusijom kao glavnim izvorom snabdevanja uvoznim energentima. Dugoročni ugovori sa Gaspromom i prisustvo ruskih energetskih kompanija u Srbiji znače da energetska politika Srbije direktno utiče na bilateralne odnose dve zemlje, ali i da direktno zavisi od tih odnosa. S druge strane, zbog svoje značajne energetske zavisnosti i velike izloženosti prema Rusiji, Srbija se neretko suočava sa rizikom pritiska od strane EU i SAD koje podstiču zemlje kandidate za članstvo u EU da smanje zavisnost od ruskih energenata i ubrzaju zelenu tranziciju, što postavlja izazove u donošenju strateških odluka.

Izazovi i rešenja u pogledu energetske bezbednosti predstavljaju podsticajan faktor za **regionalnu energetska saradnja.** Srbija učestvuje u regionalnim energetskim projektima poput Balkanskog gasnog koridora, što može doprineti diversifikaciji snabdevanja i smanjenju zavisnosti od jednog dobavljača.

Najzad, kao neizostavni deo pitanja dugoročne energetske bezbednosti javlja se i **zelena agenda** i pristup međunarodnim, pre svega EU fondovima za njenu realizaciju. U okviru evropskih integracija, Srbija mora da prilagodi svoju energetsku politiku standardima EU (dekarbonizacija, smanjenje emisija CO_2), kako bi mogla da koristi evropske fondove za energetsku tranziciju što predstavlja svojevrsni izazov za energetsku politiku Srbije, ali i veliku razvojnu i tranzicionu šansu za razvoj sveukupnog energetskog sektora zemlje.[1]

Iz svega navedenog jasno je da je energetska bezbednost strateško pitanje za svaku savremenu državu jer utiče na njenu ekonomsku stabilnost, političku situaciju i međunarodni položaj. S obzirom na zavisnost od fosilnih goriva i geopolitičke izazove, Srbija mora da diversifikuje energetske izvore, ubrza razvoj obnovljivih izvora energije i izgradi otporniji energetski sistem kako bi dugoročno obezbedila sigurnost i stabilnost u uslovima rastuće tražnje za energijom. Kao prepreka na tom putu pojavljuju se različiti i često suprotstavljeni geopolitički, ekonomski i drugi interesi čiji protagonisti koriste različite kanale uticaja kako bi energetsku agendu Srbije prilagodili svojim interesima i usmerili je u željenom pravcu.

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1 https://eukonvent.org/wp-content/uploads/2021/06/5e903d46fe5d2ade929d22b0_Knjiga-preporuka-Nacionalnog-konventa-o-EU-2015-web.pdf

U tu svrhu često se koriste kanali medijskih i informacionih uticaja koji neretko pribegavaju nedozvoljenim sredstvima u vidu kampanja dezinformacija, usmerenog oblikovanja javnog mnjenja i hibridnih dejstava koje predstavljaju sve ozbiljni bezbednosni izazov za sve zemlje, a Srbiju zbog specifičnih socioekonomskih, geopolitičkih i kulturoloških faktora posebno ranjivom i osetljivom na tu vrstu bezbednosnih izazova.

CILJ ANALIZE

Kao značajan segment ukupne energetske bezbednosti modernih država pojavljuju se izazovi koji dolaze od kampanja dezinformacija i ciljanog usmeravanja informacija o energetskoj bezbednosti, kao i hibridnih dejstava u ovoj oblasti na šta Srbija pokazuje relativno nizak nivo otpornosti. Glavni cilj analize jeste prepoznavanje, identifikacija i dokumentovanje ključnih dezinformacija koje su prisutne u javnom prostoru kada je reč o energetskoj bezbednosti Srbije. Ovaj aspekt analize uključuje: **prepoznavanje dominantnih narativa** (koje neistinite ili manipulativne tvrdnje se najčešće pojavljuju; da li su usmerene ka diskreditaciji određenih političkih odluka, podsticanju straha, polarizaciji društva ili jačanju zavisnosti od pojedinih energetskih aktera?), **oblasti dezinformacija** (da li se dezinformacije odnose na izvore energije, snabdevanje, cene, energetsku tranziciju, međunarodne ugovore ili geopolitičke pritiske?); **oblici i formati dezinformacija** (da li su prisutne u obliku lažnih vesti, manipulativnih naslova, izvrtanja konteksta, selektivnog predstavljanja podataka ili kroz kampanje na društvenim mrežama?); **poređenje sa realnim podacima** (upoređivanje dezinformacija sa proverljivim podacima iz pouzdanih izvora - izveštaji energetskih agencija, stručne analize, međunarodne organizacije, istraživačko novinarstvo).

Analiza takođe ima za cilj da identifikuje aktere koji su odgovorni za širenje dezinformacija o energetskoj bezbednosti. Ovaj deo obuhvata: **medijske izvore** (koji mediji najčešće plasiraju dezinformacije; da li su to tabloidi, internet portali, televizije sa nacionalnom frekvencijom ili alternativni mediji?); **politički akteri i interesne grupe** (da li pojedini političari, stranke, energetski lobiji ili druge organizacije imaju interes da manipulišu informacijama o energetici?); **strani uticaji** (da li postoje dokazi o spoljnim akterima koji plasiraju ili podstiču dezinformacije, poput npr. proruskih ili prozapadnih narativa, ekonomskih i geopolitičkih interesa velikih sila i posebno njihove kompatibilnosti i usklađenosti sa nacionalnim i energetskim interesima Srbije); **kreatori javnog mnjenja i nestručni analitičari** (kako pojedinci koji nemaju kredibilitet u oblasti energetike doprinose širenju netačnih informacija?).

Dezinformacije o energetskoj bezbednosti mogu značajno uticati na percepciju građana, oblikovanje javnih politika i donošenje strateških odluka zbog čega se postavlja i pitanje **uticaja dezinformacija na javno mnjenje i proces donošenja političkih odluka.** Ovaj aspekt analize uključuje: **percepciju**

građana o energetskoj sigurnosti (da li dezinformacije stvaraju osećaj panike, nesigurnosti ili podrške određenim političkim opcijama?); **uticaj na formiranje javnog mnjenja** (Kako lažne informacije utiču na stavove građana o energetskoj politici Srbije; da li podstiču nepoverenje u institucije, internacionalne partnere ili domaće energetske projekte?); **efekat na proces donošenja političkih odluka** (da li širenje dezinformacija može uticati na donošenje loših odluka u energetskoj politici poput odlaganja energetske tranzicije, štetnih ugovora, odbijanja diversifikacije izvora snabdevanja i sl?); **uticaj na regionalnu i međunarodnu poziciju Srbije** (da li dezinformacije mogu ugroziti međunarodnu saradnju u energetskom sektoru, usporiti evropske integracije ili narušiti odnose sa ključnim partnerima?); **društvena polarizacija i konflikt** (da li dezinformacije doprinose stvaranju podela među građanima, podstičući prozapadne i proruske energetske narative koji izazivaju političke i društvene sukobe?).

Kombinovana analiza dezinformacija, njihovih izvora i posledica na javno mnjenje pruža dublje razumevanje kako se manipuliše informacijama o energetskoj bezbednosti u Srbiji. Krajnji cilj je da se doprinese medijskoj i energetskoj pismenosti građana, kao i da se izrade preporuke za suzbijanje dezinformacija i jačanje odgovornog medijskog izveštavanja o ovoj ključnoj temi.

METODOLOŠKI OKVIR

Metodološki okvir analize dezinformacija o energetskoj bezbednosti Srbije se temelji na kombinovanom metodološkom pristupu koji obuhvata prikupljanje, sistematizaciju i analizu podataka iz različitih izvora kako bi se identifikovali ključni narativi, dezinformacije, njihovi izvori i uticaj na javno mnjenje. Metodologija istraživanja obuhvata sledeće ključne aspekte: **metode prikupljanja podataka, oblasti monitoringa i vrste analiza,** kao ključnog metoda obrade i interpretacije podataka**.**

U pogledu metoda prikupljanja podataka u radu su korišćeni:

Analiza medijskog sadržaja u okviru koje su prikupljeni i analizirani članci, vesti, komentari i analize iz domaćih i međunarodnih medija koji izveštavaju o energetskoj bezbednosti Srbije. Monitoring je obuhvatio tradicionalne medije (TV, radio, štampu) i digitalne medije (portale, blogove). Fokus je bio na identifikaciji dezinformacija, spinovanja činjenica, neproverenih tvrdnji i pristrasnog izveštavanja.

U okviru identifikacije izvora informacija proveravani su primarni izvori podataka koji se navode u medijskim i društvenim objavama (institucionalni izvori, zvanične energetske agencije, međunarodne organizacije). Analizirane

su veze između određenih medija i političkih, ekonomskih ili stranih interesnih grupa. Posebna pažnja posvećena je dezinformacijama koje dolaze iz neimenovanih ili nepouzdanih izvora i njihovoj daljoj distribuciji.

U pogledu **oblasti monitoringa** praćeni su ključni aspekti energetske bezbednosti koji su podložni dezinformacijama, a analiza je obuhvatila sledeće oblasti: **snabdevanje energijom** (da li postoje manipulacije u izveštavanju o stabilnosti snabdevanja gasom, strujom i naftom?); **cene energenata** (da li se plasiraju netačne informacije o uzrocima poskupljenja i odgovornosti za promene cena?); **energetski sporazumi i geopolitika** (da li postoje dezinformacije o međunarodnim energetskim ugovorima i odnosima Srbije sa Rusijom, EU i drugim akterima?); **obnovljivi izvori energije** (da li se šire lažne informacije o kapacitetima OIE i njihovom uticaju na energetsku sigurnost?); **uloga međunarodnih institucija** (da li su EU, MMF, Svetska banka i druge institucije meta dezinformacija u kontekstu energetskih reformi u Srbiji?).

Tokom istraživanja i izrade analize korišćene su:

- Kvantitativna analiza (u okviru koje su korišćene tehnike prikupljanja podataka pomoću softverskih alata za analizu društvenih mreža i medijskog sadržaja; identifikovan je broj objava, članaka i komentara koji sadrže dezinformacije o energetskoj bezbednosti; analizirani su trendovi u vremenskim periodima – kada su dezinformacije bile najprisutnije i u kojim kontekstima.)

- Kvalitativna analiz u okviru koje je analizirana struktura dezinformacija: način na koji su formulisane, da li se oslanjaju na emocije, strah, teorije zavere ili manipulaciju činjenicama; identifikovani su ključni akteri koji šire određene narative i njihovi interesi; upoređene su dezinformacije sa zvaničnim i proverljivim podacima kako bi se utvrdio stepen manipulacije.

- Analiza mrežne propagacije - korišćena je metoda praćenja toka dezinformacija – kako određene tvrdnje započinju, kako se šire i ko ih preuzima; identifikovane su mreže botova, lažnih profila i koordinisanih kampanja koje podržavaju određene narative.

Kombinacija kvantitativnih i kvalitativnih metoda omogućila je sveobuhvatan uvid u način na koji se dezinformacije o energetskoj bezbednosti Srbije plasiraju i utiču na javno mnjenje. Analiza medijskog sadržaja, društvenih mreža i izvora informacija pomogla je u identifikaciji ključnih dezinformacionih narativa, aktera koji ih šire i njihovog potencijalnog uticaja na donošenje odluka u energetskom sektoru. Ovim metodološkim pristupom obezbeđeni su objektivni i merljivi podaci koji mogu poslužiti kao osnova za borbu protiv dezinformacija i promociju tačnih i pouzdanih informacija o energetskoj bezbednosti Srbije.

KONTEKST ENERGETSKE BEZBEDNOSTI U SRBIJI

Energetska bezbednost Srbije oblikovana je kroz kombinaciju faktora domaće proizvodnje energije, oslanjanja na uvoz ključnih energenata i strateških energetskih politika koje nastoje da obezbede stabilnost snabdevanja. U sagledavanju ukupnog konteksta energetske bezbednosti Srbije bitno je nekoliko aspekata.

1. Oslanjanje na uvoz energenata

Srbija je značajno zavisna od uvoza energenata, posebno kada je reč o prirodnom gasu i nafti. Kada je reč o **prirodnom gasu,** više od 85% potreba za gasom Srbija zadovoljava uvozom, dominantno iz Rusije putem gasovoda *Turski tok*. Iako postoje planovi za diversifikaciju izvora (izgradnja interkonektora sa Bugarskom koji omogućava pristup gasu iz Azerbejdžana i LNG terminalima u grčkoj luci Aleksandropulis), zavisnost od ruskog gasa ostaje ključan faktor energetske politike. U pogledu **nafte i naftnih derivata,** Srbija većinu sirove nafte uvozi, a značajan deo prerađuje u Rafineriji Pančevo, kojom upravlja *NIS* (većinski u vlasništvu ruskog *Gaspromnjefta*). Najznačajniju energetsku proizvodnju Srbija ostvaruje u oblasti **električne energije.** Srbija tradicionalno proizvodi dovoljno struje za sopstvene potrebe, ali su u poslednjim godinama uvozni troškovi porasli zbog problema u termoelektranama i povećane potrošnje. Ukupna zavisnost od uvoza čini Srbiju energetski ranjivom na globalne krize, poremećaje u snabdevanju i geopolitičke pritiske.

2. Kapaciteti domaće proizvodnje energije

Domaća proizvodnja energije u Srbiji oslanja se na nekoliko ključnih sektora. **Termoelektrane na ugalj.** Oko 70% ukupne električne energije proizvodi se u termoelektranama na lignit (*Kostolac*, *Obrenovac – TENT*).[2] Problemi sa eksploatacijom uglja, zastarela infrastruktura i ekološki izazovi dovode do nesigurnosti u snabdevanju. **Hidroelektrane**. Oko 25% proizvodnje struje dolazi iz hidroelektrana, među kojima su ključne *Đerdap I i II* i *Bajina Bašta*. U godinama sa niskim vodostajem proizvodnja hidroenergije značajno opada.

Obnovljivi izvori energije (OIE). Vetroparkovi i solarni paneli su u porastu, ali još uvek čine mali deo energetskog miksa (oko 4-5%). Država postepeno povećava kapacitete, ali ulaganja u zelenu energiju su i dalje ispod proseka EU. U celini gledano domaća proizvodnja pokriva većinu potreba za strujom, ali zavisnost od uglja i klimatski uslovi koji utiču na hidroenergiju čine sistem ranjivim.

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2 https://www.eps.rs/lat/poslovanje-ee/Stranice/Proizvodnja-elen.aspx

3. Energetske politike i planovi za budućnost

Srbija nastoji da poveća svoju energetsku sigurnost kroz nekoliko ključnih strategija. **Diversifikacija izvora snabdevanja gasom**. Izgradnja gasne interkonekcije sa Bugarskom i potencijalno sa Severnom Makedonijom i Rumunijom smanjuje zavisnost od ruskog gasa.

Povećanje obnovljivih izvora energije. Vlada planira povećanje kapaciteta vetroparkova i solarnih elektrana, ali je potrebno veće investiranje i bolji regulatorni okvir.

Modernizacija termoelektrana i smanjenje emisija. Zbog zahteva u pogledu ispunjavanja EU standarda, Srbija mora smanjiti emisije CO_2 i poboljšati rad termoelektrana, ali su ulaganja u ovu oblast još uvek nedovoljna.

Regionalna saradnja u energetici. Srbija je deo *Berzanske platforme za električnu energiju* (SEEPEX) i učestvuje u regionalnim inicijativama za energetsku integraciju.

Cilj energetske politike Srbije je obezbeđenje stabilnog snabdevanja uz postepenu tranziciju ka održivijim izvorima energije. Međutim, spora diversifikacija i politički izazovi otežavaju brze promene u sistemu. Trenutni energetski sistem Srbije oslanja se na kombinaciju domaće proizvodnje (pretežno iz uglja i hidroelektrana) i uvoza ključnih energenata (prirodni gas i nafta). Energetske politike usmerene su ka diversifikaciji snabdevanja i razvoju OIE, ali su ograničene finansijskim, infrastrukturnim i političkim izazovima. Energetska bezbednost Srbije ostaje strateško pitanje, direktno povezano sa ekonomijom, međunarodnim odnosima i održivošću budućeg razvoja zemlje.

Pored kapaciteta postojećeg energetskog sektora Srbije, bitnu ulogu u kreiranju konteksta energetske bezbednosti zemlje igraju **glavni međunarodni i domaći faktori i akteri koji utiču na energetsku stabilnost Srbije.** Ona u velikoj meri zavisi od kombinacije globalnih geopolitičkih kretanja, odnosa sa ključnim međunarodnim partnerima i unutrašnjih političkih i ekonomskih odluka. Ključni faktori uključuju uticaj Rusije, EU, Kine, zelene tranzicije i geopolitičkih kriza.

Rusija. Srbija pokazuje visok stepen zavisnosti od ruskih energenata i geopolitičkih pritisaka. U pogledu uvoza **gasa i nafte,** Srbija se oslanja na Rusiju za snabdevanje prirodnim gasom (putem *Balkan Streama*), dok *NIS* (Naftna industrija Srbije) većinski kontroliše ruski *Gaspromnjeft*. Ova zavisnost čini Srbiju ranjivom na energetske krize i političke pritiske iz Moskve. Visok nivo zavisnosti čini Srbiju dodatno izloženom **geopolitičkim rizicima**. Zbog rata u Ukrajini i sankcija Rusiji, EU sve više smanjuje zavisnost od

ruskih energenata, što vrši pritisak i na Srbiju da diversifikuje snabdevanje gasom i naftom. Takođe, jednostrana zavisnost Srbije od ruskih izvora snabdevanja bitno utiče i na **cenu i stabilnost snabdevanja.** Rusija nudi Srbiji povoljnije uslove za gas, koji se često preuveličavaju zarad unutrašnjih političkih interesa i ciljeva, uprkos činjenici da politička nestabilnost može dovesti do problema u snabdevanju ili povećanja cena.

Evropska unija. S obzirom da je Srbija kandidat za članstvo u EU, njena energetska politika je suočena za zahtevima za **usklađivanje sa energetskim strategijama i politikama EU,** ali i sa **podrškom energetskoj tranziciji** koja dolazi iz EU pristupnih fondova i posebnih aranžmana sa Unijom i zemljama članicama. Kao zemlja kandidat za EU, Srbija mora da uskladi svoju energetsku politiku sa evropskim standardima, **pravilima i regulativom** uključujući smanjenje zavisnosti od uglja i povećanje korišćenja obnovljivih izvora energije. Bitan deo usklađivanja obuhvata i **ispunjavanje zelene agende i dekarbonizaciju.** EU podstiče Srbiju da smanji emisije CO_2 i napusti ugalj kroz *Zelenu agendu za Zapadni Balkan*, ali energetska infrastruktura Srbije još uvek dominantno zavisi od uglja. Zajedno sa kriterijumima koji važe za sve kandidate za članstvo u EU dolaze i **mogućnosti korišćenja pristupnih fondova Unije u vidu finansijske pomoći**. EU nudi investicije i subvencije za projekte energetske efikasnosti, izgradnju interkonektora i razvoj obnovljivih izvora energije, ali je implementacija sporija od očekivanog.

Kina. U pogledu ekonomskih, pa i energetskih odnosa, Kina za Srbiju ima ulogu **strateškog investitora u energetsku infrastrukturu.** U tom smislu posebno se ističu **ulaganja u termoelektrane i obnovljive izvore** energije. Kineske kompanije su uključene u projekte modernizacije srpskih termoelektrana (*Kostolac B*), ali i u izgradnju vetroparkova i solarnih elektrana. Specifični ekonomski modeli saradnje sa Kinom mogu po Srbiju da proizvedu **dugoročne ekonomske posledice**. Krediti i investicije iz Kine često dolaze sa visokim kamatama i dugoročnim obavezama, što može ograničiti fleksibilnost Srbije u budućnosti. Bitan aspekt saradnje sa Kinom jesu i **prateći ekološki problemi** koji često prate kineske investicije u zemljama sa slabim institucijama i nedovoljno razvijenim sistemima ekološke zaštite. Projekti u saradnji sa Kinom često izazivaju kritike zbog loših ekoloških standarda, što može biti prepreka u približavanju EU standardima.

Posebno značajan segment ukupnog energetskog konteksta Srbije čine pitanja **zelene tranzicije, kao i izazovi i prilike** koje ona nosi sa sobom. **Neophodnost prelaska na OIE** nameću Srbiji obavezu povećanja udela obnovljivih

izvora energije (solarne elektrane, vetroparkovi, hidroenergija) kako bi smanjila emisije i uskladila se sa evropskim politikama. Tranzicija donosi i značajne **probleme i izazove**. Prelazak na čistu energiju zahteva velika ulaganja, restrukturiranje EPS-a (Elektroprivrede Srbije) i poboljšanje energetske efikasnosti, što je proces koji traje godinama. Zelena tranzicija donosi i značajne **mogućnosti finansiranja**. EU, Svetska banka i drugi međunarodni partneri nude fondove za tranziciju, ali Srbija mora pokazati političku volju i kapacitete za sprovođenje reformi.

Konačno, energetski kontekst Srbije u značajnoj meri oblikuju **geopolitičke krize i globalni poremećaji u snabdevanju energijom. Rat u Ukrajini** je doveo do skoka cena energenata i pritiska na Srbiju da se distancira od uvoza ruskog gasa i nafte, ali i politike uslovljavanja od strane Rusije u pogledu geopolitičkog opredeljenja Srbije. **Globalna energetska kriza,** nestabilnosti na tržištima nafte i gasa, sankcije i prekidi u lancima snabdevanja utiču na dostupnost i cene energenata u Srbiji. Takođe, pored mogućnosti za saradnju, poremećaji u energetskom snabdevanju mogu uticati i na **regionalnu nestabilnost**. Problemi u energetskom sistemu regiona (npr. Kosovo, Bosna i Hercegovina) mogu uticati na stabilnost snabdevanja električnom energijom u Srbiji.

Energetska stabilnost Srbije zavisi od niza faktora, uključujući zavisnost od ruskih energenata, pritiske EU za zelenu tranziciju, kineske investicije, globalne energetske krize i domaće političke odluke. Ključni izazov u narednim godinama biće diversifikacija izvora snabdevanja i ubrzavanje prelaska na obnovljive izvore energije, uz očuvanje ekonomske stabilnosti i energetske sigurnosti.

Bitan deo ukupnog energetskog konteksta Srbije čini i **istorijski kontekst njene energetske bezbednosti. Ona je** kroz istoriju bila oblikovana promenama u geopolitičkim okolnostima, ekonomskim transformacijama i krizama koje su pogađale globalna i regionalna tržišta energenata. Od SFRJ do današnje Srbije, energetska stabilnost uvek je zavisila od spoljnopolitičkih odnosa i unutrašnjih reformi.

U tom smislu posebnu ulogu u kreiranju ukupnog konteksta igrale su energetske krize u prošlosti, kao i njihov uticaj na Srbiju.

- ***Naftna kriza 1973. i 1979. – Prvi globalni energetski šokovi***

SFRJ je bila pogođena povećanjem cena nafte, ali je država nastojala da diverzifikuje izvore snabdevanja i ubrza razvoj domaće proizvodnje uglja i hidroenergije. Fokus je bio na izgradnji hidroelektrana (*Đerdap*), povećanju eksploatacije uglja i smanjenju zavisnosti od uvoza nafte iz Bliskog istoka.

- ***Sankcije 1990-ih – Potpuna energetska izolacija***

Raspad Jugoslavije i međunarodne sankcije 1992-1995. dovele su do ozbiljne energetske krize. Nestašice goriva, gasnih derivata i problema u snabdevanju električnom energijom postali su svakodnevica, što je dodatno pogoršalo ekonomsku i političku situaciju. Srbija se oslanjala na alternativne metode snabdevanja, uključujući šverc i trgovinske aranžmane sa susednim zemljama.

- ***NATO bombardovanje 1999. – Razaranje energetske infrastrukture***

Tokom bombardovanja pogođeni su ključni elektroenergetski objekti, rafinerije i dalekovodi, što je dovelo do dugotrajnih restrikcija struje i privremenog kolapsa energetskog sistema. Obnova energetskih kapaciteta trajala je godinama, uz međunarodnu pomoć i postepeno otvaranje ka novim investicijama.

- ***Gasna kriza 2009. – Osetljivost na spoljni pritisak***

Zbog sukoba između Rusije i Ukrajine oko gasnih isporuka, Srbija je doživela prekid snabdevanja gasom, što je ukazalo na visok stepen energetske zavisnosti od ruskog gasa. Kao odgovor, pokrenuti su planovi za diversifikaciju izvora, ali su konkretni koraci sporo realizovani.

Sve navedene krize u značajnoj meri su definisale potencijalne izazove u energetskoj bezbednosti Srbije kako u pogledu njihovih kratkoročnih, tako i u pogledu srednjoročnih i dugoročnih faktora.

Kratkoročni izazovi (1-5 godina)

Rast cena energenata – Nestabilnosti na globalnom tržištu mogu dovesti do naglih skokova cena nafte, gasa i električne energije. **Zavisnost od ruskog gasa** – Srbija još uvek nema dovoljno diversifikovan energetski miks i oslanja se na snabdevanje preko *Balkan Stream-a*. **Kapacitet EPS-a** – Problemi u EPS-u, zastarela infrastruktura i loše upravljanje mogu ugroziti stabilnost snabdevanja strujom. **Pritisak EU za zelenu tranziciju** – EU očekuje ubrzano smanjenje upotrebe uglja, što može izazvati energetske deficite ako ne budu razvijeni alternativni izvori.

Srednjoročni izazovi (5-15 godina)

Izgradnja energetske infrastrukture – Srbija mora investirati u nove kapacitete za obnovljive izvore energije i razviti skladišne kapacitete za gas i električnu energiju. **Regionalna saradnja** – Jačanje energetske povezanosti sa susedima kroz interkonektore i zajedničke projekte može smanjiti zavisnost od jednog izvora snabdevanja. **Privatizacija i reforme** – Elektroprivreda Srbije

mora proći kroz reforme kako bi postala konkurentnija i efikasnija. **Povećana potrošnja energije** – Industrijski razvoj i ekonomski rast povećavaju potražnju za energijom, što zahteva strateško planiranje novih izvora energije.

Dugoročni izazovi (15+ godina)

Potpuni prelazak na zelenu energiju – Srbija će morati da napusti ugalj do 2050. godine u skladu sa EU politikama, što zahteva dugoročne investicije i tranziciju u sektoru rada. **Globalni geopolitički trendovi** – Balansiranje između Rusije, EU, Kine i SAD-a u pogledu energetske politike biće ključno za dugoročnu stabilnost snabdevanja. **Klimatske promene** – Ekstremni vremenski uslovi mogu uticati na hidroenergiju i stabilnost energetskih mreža, što nameće potrebu za prilagođavanjem infrastrukture.

Istorijske energetske krize pokazale su koliko je Srbija ranjiva na spoljne uticaje i kako energetska politika mora biti dugoročno planirana. Kratkoročni izazovi uključuju stabilizaciju snabdevanja i cena, srednjoročni izazovi se odnose na reforme i investicije, dok dugoročno gledano, Srbija mora postati energetski održiva kroz tranziciju ka obnovljivim izvorima i smanjenje zavisnosti od spoljašnjih faktora.

IDENTIFIKACIJA I ANALIZA KLJUČNIH NARATIVA I DEZINFORMACIJA

U javnom prostoru Srbije prisutni su različiti narativi o energetskoj bezbednosti, koji se često koriste za oblikovanje javnog mnjenja u skladu s političkim, ekonomskim ili geopolitičkim interesima. Dezinformacije u ovoj oblasti mogu imati ozbiljne posledice po razumevanje energetske politike, donošenje odluka i percepciju međunarodnih aktera. Najčešći narativi mogu se podeliti u nekoliko glavnih kategorija, prema različitim kriterijumima: **geopolitički** (“Rusija je jedini pouzdan energetski partner Srbije”), **ekonomski** (“Obnovljivi izvori su neisplativi i nesigurni”) i **sociopopulistički** (“Struja i gas moraju ostati jeftini po svaku cenu”).

Prema periodu i specifičnom kontekstu nastanka mogu se svrstati u nekoliko vremensko-tematskih celina:

- **prodaja Naftne industrije Srbije ruskom Gaspromnjeftu** (“Srpska privreda zavisi od NIS, rusko vlasništvo u kompaniji je neupitno, a promena vlasništva bespredmetna“);
- **pitanje energetske diversifikacije** (”Ruski gas je nezamenljiv - diversifikacija je nemoguća“);
- **pitanje sankcija Ruskoj Federaciji zbog agresije na Ukrajinu** („U slučaju sankcija na gas, nastala bi apokalipsa“);

- **pitanje nuklearne energije** kao temelja dugoročne održivosti energetske proizvodnje i bilansa ("Najbolji kandidat za strateškog partnera Srbije je Rosatom"),
- **pitanje zelene agende** ("Zelena agenda je ucena EU i SAD").

U medijskom prostoru Srbije, temama vezanim za energetsku bezbednost uglavnom se bave specijalizovani energetski časopisi i portali koji su namenjeni stručnoj javnosti i biznis zajednici. S druge strane mejnstrim mediji se ovim temama uglavnom bave periodično, u zavisnosti od političkog značaja i dnevne aktuelnosti teme i to uglavnom na površan i politički obojen način. U analizi sajta **Cenzolovka** o pisanju srpskih štampanih medija o rusko-srpskim odnosima ukazuje se na jednostranost, površnost i odsustvo činjenica:

„Ono što je odmah uočljivo prilikom analize sadržaja domaće dnevne štampe jeste površnost u pristupu i izveštavanju. To je slučaj i prilikom izveštavanja o Rusiji i srpsko-ruskim odnosima gde nema nikakve dublje analize niti kritičkog osvrta, dok se u najvećoj meri samo prenose zvanična saopštenja političara uz kreiranje senzacionalnih naslova i priča"[3]. U istraživanju se ukazuje da ni jedan od analiziranih tekstova o srpsko-ruskim odnosima nije negativan prema Rusiji dok je samo njih 10 neutralno, dok su ostali pozitivni. Istovremeno Evropska unija se ni jednom ne pojavljuje u pozitivnom kontekstu.

Prodaja Naftne industrije Srbije (NIS) ruskoj kompaniji Gaspromnjeft i planirana izgradnja gasovoda Južni tok bili su značajni događaji koji su privukli veliku pažnju srpskih medija. Medijski izveštaji su pružali različite perspektive o ovim temama, od isticanja potencijalnih koristi do izražavanja kritičkih stavova.

U januaru 2008. godine, Vlada Srbije i ruski Gasprom potpisali su sporazum o prodaji 51% akcija NIS-a za 400 miliona evra, uz obavezu Gasproma da investira dodatnih 500 miliona evra do 2012. godine. Ovaj sporazum je bio deo šireg energetskog aranžmana koji je uključivao i izgradnju gasovoda Južni tok kroz Srbiju. Mediji su uglavnom nekritički naglašavali strateški značaj ovog sporazuma za Srbiju, ističući da će prodaja NIS-a i izgradnja Južnog toka ojačati energetsku bezbednost zemlje i pozicionirati je kao ključnu tranzitnu rutu za ruski gas ka Evropi. Takođe, isticano je da će ove investicije doprineti modernizaciji energetske infrastrukture i otvaranju novih radnih mesta.

Međutim, bilo je i kritičkih mišljenja. Neki analitičari i mediji su smatrali da je NIS prodat po ceni nižoj od tržišne vrednosti, što je izazvalo sumnje u povoljne uslove sporazuma za Srbiju. Takođe, postavljana su pitanja o

3 https://www.cenzolovka.rs/etika/pro-ruski-narativ-u-srpskim-medijima-2-zasto-su-domaci-mediji-emotivniji-od-ruskih/?utm_source=chatgpt.com

transparentnosti pregovora i mogućim političkim motivima iza sporazuma. Na primer, u analizi objavljenoj na portalu NSPM.rs, postavljeno je pitanje da li je privatizacija NIS-a bila štetan posao za Srbiju.

Osnovnu matricu složenog sistema dezinformacija i manipulativnih sadržaja činio je centralni narativ o **nezamenljivosti i pouzdanosti Rusije** kao energetskog partnera i dominantnog snabdevača Srbije ključnim energentima. U onim slučajevima kada je trebalo racionalizovati ekonomski neisplative poteze srpskih vlasti u pomoć su prizivani geopolitički argumenti poput ruskog veta u Savetu bezbednosti UN na nezavisnost Kosova (iako se o toj temi nikada nije glasalo pred ovim telom), ali i lažna obećanja poput onog o izgradnji magistralnog gasovoda Južni tok koji je prihodima od taksi Srbiji trebalo da nadoknadi minus iz bazične transakcije prodaje nacionalne naftne kompanije.

Kao primeri onih koji su prednjačili u kreiranju i plasiranju poruka iz ovog narativa bili su energetski stručnjaci i specijalizovani novinari poput Jelice Putnjiković, urednice specijalizovanog energetskog portala Energija Balkana. U organizaciji tog portala održava se veliki broj stručnih konferencija o energiji, Putnjikovićeva je promovisana i nametnuta kao kredibilan gost ključnih medija na temu energetske bezbednosti Srbije posebno od strane Radio televizije Srbije, nacionalnog medijskog javnog servisa. Sve to uprkos činjenici, koja se retko gde navodi prilikom njenih javnih nastupa, da je ona direktno interesno povezana sa Ruskom Federacijom preko državne agencije Sputnjik na čijem sajtu vodi emisiju Energija Sputnjika.

U vreme prodaje NIS, Putnjikovićeva je prednjačila u kreiranju javnog mnjenja u pravcu odobravanja prodaje pod izuzetno nepovoljnim uslovima za Srbiju. Tako je u svojim brojnim gostovanjima prodaju NIS i obećanje o izgradnji gasovoda Južni tok predstavljala jednim do najvažnijih infrastrukturnih projekata za čitav region[4]. Posebno istaknutu ulogu Putnjikovićeva je dobila i 16 godina kasnije kada su dominantna tema postale sankcije koje su SAD uvele Gaspromnjeftu i NIS-u kao kompaniji koja se nalazi u većinskom ruskom vlasništvu. Ukazujući kako je rusko vlasništvo u NIS neupitno, a njegova promena bespredmetna, Putnjikovćeva je ukazala kako bi **„celokupna srpska privreda bila pogođena uvođenjem sankcija Naftnoj industrije Srbije"** te dodala da bi „najbolja alternativa bila da Srbija objasni Amerikancima da je NIS kompanija koja je veoma bitna za funkcionisanje sprske privrede i da bi uvođenjem tih sankcija oni zapravo uveli sankcije celoj srpskoj privredi".[5]

4 https://balkans.aljazeera.net/videos/2012/12/7/jelica-putnikovic-o-juznom-toku

5 https://www.euronews.rs/biznis/biznis-vesti/149959/putnikovic-celokupna-srpska-privreda-bi-bila-pogodena-uvodenjem-sankcija-naftnoj-industrije-srbije/vest

Navodni posao veka je nastavio da veliča Javni servis tvrdeći da će cena 450 kilometara "Južnog toka" kroz Srbiju biti 700 miliona evra, kao i da je Rusija obećala da će gasovod biti završen pre rivalskog projekta EU nazvanog "Nabuko".[6] Proruski portal Nove srpske političke misli je „objasnio" zašto je za Srbiju (ipak) dobro što je Gasprom kupio NIS. U tekstu koji je potpisao malo poznati autor Aleksandar Kostić tvrdi se da je NIS u javnosti izložen konstantnim napadima, koji se pojačavaju negativnim kampanjama poput teza da smo kompaniju „poklonili Rusima".

„Tim povodom, zanimljivo je primetiti da, iako Insajder i ostali posredno tvrde da je posao sa Rusima prepreka evrointegracijama Srbije, to apsolutno nije tačno. Istina je baš suprotna i zvanična politika NIS-a bila je da podržava evrointegracije Srbije i da zbog poslovnih projekata u Rumuniji, Bugarskoj i Mađarskoj NIS sarađuje sa institucijama Evropske unije".[7] U samom tekstu se ne kriju geopolitički motivi za ovaj posao navodeći da se prodajom NIS uticaj Rusije na velika vrata uvodi u region.

Međutim, uprkos velikim obećanjima posao izgradnje "Južnog toka" je propao, a iz ruskih državnih medija namenjenih srpskoj publici saopšteno je da je u slučaju ovog gasovoda Srbija samu sebe kaznila jer se kao zemlja kandidat pridržavala pravila EU.[8]

O štetnosti posla postojali su i značajni kritički glasovi, ali po pravilu na manje frekventnim portalima i bez mogućnosti da se ovi argumenti čuju u mejnstrim medijima. Tako je, primera radi, 2011. godine na portalu ***republika.co.rs*** objavljena analiza sa istorijskim pregledom odnosa „**Srbije i Gaspromа – od Miloševića do danas**" u kojoj je ukazano da je čitav posao obavijen velom netransparentnosti kao i da je energetika stavljena u službu političkih interesa Gaspromovih lobista.[9]

Kada je postalo jasno da od obećanja gradnje gasovoda "Južni tok" neće biti ništa, država je osnovala radnu grupu sa ciljem ispitivanja štetnosti čitavog posla. I dok su zvaničnici tadašnje vlade bili uvereni da istraga o privatizaciji NIS neće ugroziti odnose sa Rusijom, bivši predsednik i glavni protagonista prodaje nacionalne naftne kompanije Rusiji, **Boris Tadić** odmah

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6 https://www.rts.rs/lat/vesti/ekonomija/62226/za-juzni-tok-700-miliona-evra.html?utm_source=chatgpt.com

7 http://www.nspm.rs/ekonomska-politika/zasto-je-za-srbiju-ipak-dobro-sto-je-gasprom-kupio-nis.html?alphabet=l#yvComment93468

8 https://lat.sputnikportal.rs/20150218/255868.html

9 http://www.republika.co.rs/494-495/20.html

je upozorio da i samo otvaranje istrage može da ugrozi odnose sa zvaničnom Moskvom.[10]

U analizi pod naslovom „**Gasne i druge geopolitičke igre: Energetski sporazum Srbije i Rusije - šta smo želeli, a šta smo posle 16 godina dobili**“, koju je 2024. objavio nedeljnik **NIN**, stručnjak za energetiku **Miloš Zdravković** ukazao je da je Srbija u potrazi za novim dobavljačima gasa, da je pokrenuta investicija izgradnje interkonektora između Srbije i Bugarske, kao i da je ugovorom Srbijagasa i azerbejdžanske državne naftne kompanije Sokara dogovoreno je da u Srbiju do kraja 2024. stigne do 400 miliona kubnih metara gasa što je količina dovoljna tek za oko 40 dana potrošnje u Srbiji.

„Ne traži samo Srbija nove izvore kupovine gasa, već i EU. Evropa je zbog toga delimično i finansirala srpsku deonicu interkonektora Srbija - Bugarska da bi se na neki način dobijao tečni prirodni gas preko Grčke, odnosno Aleksandropulosa gde se gradi terminal“.[11]

O dubini ulaska Gasproma u sve društvene pore u Srbiji čime se delimično objašnjava ruski geopolitički uticaj u regionu, redakcija BBC na srpskom jeziku je pisala u martu 2022. godine, neposredno nakon početka ruske agresije na Ukrajinu u tekstu „**Gasprom u Srbiji - od nafte i gasa, preko sporta, do Guče i Egzita“** BBC je ukazao na dve uloge Gasproma u Srbiji, od glavnog trgovca naftom i gasom do velikog sponzora u sportu i kulturi.[12]

U intervjuu za isti medij tada već odlazeća ministarka energetike **Zorana Mihajlović** je priznala da je Srbija praktično predala naftnu i gasnu privredu Rusiji, ukazujući istovremeno da su **„Interesi ruskih lobija bili jači”** kada se birao izvor gasa u Srbiji.**[13]** „Mi smo praktično predali i naftnu i gasnu privredu Ruskoj Federaciji još 2008. godine - mislim da je to pogrešno, a ova kriza je samo pokazala koliko”, rekla je Mihajlovićeva.[14]

NIS je iznova probudio pažnju punih deset godina kasnije kada je predsednik Srbije **Aleksandar Vučić** u decembru 2024. godine objavio informaciju da će SAD uvesti **sankcije kompaniji Gaspromnjeft i NIS-u** zbog većinskog ruskog vlasništva. To je aktiviralo čitav mehanizam odbrane ruskih interesa putem manipulativnih dirigovanih kampanja koje su ponovo u prvi plan isticale neminovnost zavisnosti Srbije od ruskih energenata.

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10 https://novibeogradafera2.blogspot.com/2015/05/poklanjamo-nis-za-kosovo.html

11 https://www.nin.rs/ekonomija/vesti/43568/
energetski-sporazum-srbije-i- rusije-sta-smo-zeleli-a-sta-smo-posle-16-godina-dobili

12 https://www.bbc.com/serbian/lat/srbija-60647346

13 https://www.bbc.com/serbian/lat/srbija-61639404

14 https://www.bbc.com/serbian/lat/srbija-61609387

Među glavnim narativima koji su tim povodom plasirani preko srpskih medija ističe se nekoliko njih:

Zabrinutost zbog mogućih sankcija i njihovog uticaja na srpsku privredu. Predsednik Srbije, Aleksandar Vučić, izjavio je da će SAD uvesti "pune, kompletne sankcije protiv Naftne industrije Srbije zbog ruskog vlasništva". Ova izjava izazvala je zabrinutost u javnosti zbog potencijalnog negativnog uticaja na srpsku privredu. Mediji povezani sa ruskim lobističkim grupama i zvaničnim strukturama odmah su preuzeli ulogu tumača nepovoljnih događaja čija je mogućnost ranije uporno negirana. Ruski državni medij **Sputnjik** objavio je tekst "**Sankcije SAD NIS-u: Pretnja sa puno nepoznanica**" u kome navodi da će glavna meta sankcija zapravo biti srpska privreda[15], što je teza koju je u svojim javnim nastupima za veći broj medija ponovila i Jelica Putnjiković.[16] Pored ove tvrdnje, Putnjikovićeva je u medijima iznela još jednu umirujuću tezu prema kojoj, uprkos sankcijama i ostanku NIS u ruskom vlasništvu „**Cene neće otići u nebesa, grejanja će biti**"[17]. Da problema neće biti, baš kao ni stečaja javile su i **Večernje novosti** u tekstu „***Neće biti stečaja, ima više mogućih rešenja***" u tekstu od 25.02.2025.[18]

Nakon prvobitnog šoka, relativno brzo je aktivirana i druga linija odbrane u vidu narativa **negiranja najave sankcija od strane američkih zvaničnika. Za ovo je iskorišćena diplomatski uzdržana izjava američkog ambasadora u Srbiji Kristofera Hila koji** je izjavio da nema najave o uvođenju sankcija protiv NIS-a, izrazivši pti tome zabrinutost zbog ruskog vlasništva nad jedinom rafinerijom u Srbiji. On je takođe istakao da sankcije ne bi smele da naškode Srbiji.[19]

Jedna linija manipulativnih, uglavnom politički motivisanih narativa bilo je **tumačenje sankcija kao pritiska na Srbiju da uvede sankcije Rusiji. Tako je potpredsednik u Vladi Srbije Aleksandar Vulin** ocenio da bi eventualne sankcije NIS-u bile pokušaj da se Srbija natera da uvede sankcije Rusiji, što bi predstavljalo pritisak na samostalnu politiku zemlje.[20]

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15 https://lat.sputnikportal.rs/20241217/1180690463.html

16 https://lat.rt.rs/ekonomija/122689-putnikovic-naftna-industrija-srbije-srpska-privreda

17 https://www.rts.rs/lat/vesti/ekonomija/5603308/nis-sankcije-amerika-rusija-srbija-gorivo-energija-cene-dizel.html

18 https://www.novosti.rs/ekonomija/vesti/1464161/nece-biti-stecaja-ima-vise-mogucih-resenja-vasingtona-jos-nema-odgovora-zahtev-naftne-kompanije-srbije-odlaganju-sankcija

19 https://www.politika.rs/sr/clanak/650481/kristofer-hil-ne-mogu-da-potvrdim-da-ce-amerika-uvesti-sankcije-nis-u-ne-bi-smele-da-naskode-srbiji

20 https://www.politika.rs/sr/clanak/650307/vulin-sad-sankcijama-nis-u-zele-da-nas-nateraju-da-uvedemo-sankcije-rusiji?utm_source=chatgpt.com

Takođe, velike nade u medijima su polagane i u **međunarodne reakcije i pokušaji posredovanja što je predstavljalo još jedan od narativa relativizacije ozbiljnosti novonastale situacije.** Mediji su izveštavali o pokušajima međunarodnih aktera da posreduju u situaciji poput hrvatskog premijera **Andreja Plenkovića** koji je izrazio potrebu za pronalaženjem održivog rešenja kako bi se izbegle sankcije koje bi mogle pogoditi Srbiju i hrvatsku kompaniju Janaf. Svoju pomoć Srbiji je ponudila i Mađarska koja je na sebe preuzela obavezu komunikacije sa američkom administracijom u pogledu zahteva za odlaganje primene sankcija.

Od prodaje NIS, preko aneksije Krima 2014. godine, a naročito od početka pune agresije Rusije na Ukrajinu 2022. godine, ključna tema u oblasti energetske bezbednosti bila je **mogućnost diversifikacije izvora snabdevanja i smanjenja zavisnosti** Srbije od snabdevanja energentima iz Rusije koja je potpadala pod sve oštriji režim međunarodnih sankcija. U tom periodu o energetskoj bezbednosti zemlje i partnerstvu sa Rusijom srpski mediji su pretežno izveštavali kroz nekoliko ključnih narativa.

Prvi i osnovni bio je onaj da je **ruski gas nezamenljiv, a diversifikacija nemoguća**. Na tom talasu mediji i brojni sagovornici su ubeđivali javnost u Srbiji i regionu u **bezperspektivnost evropskih, pa samim tim i srpskih pokušaja diversifikacije**. U skladu sa nametnutim narativom istican je značaj **strateškog partnerstva sa Rusijom.** Mnogi mediji su isticali Rusiju kao ključnog strateškog partnera Srbije, posebno u oblasti energetike. Ovi izveštaji su naglašavali važnost saradnje sa Rusijom za energetsku sigurnost zemlje, uključujući stabilno snabdevanje gasom i naftom. Na primer, predsednik Srbije Aleksandar Vučić je 2017. godine tokom sastanka sa potpredsednikom Vlade Ruske Federacije Dmitrijem Rogozinom istakao da je Rusija jedan od strateških ekonomskih i spoljnotrgovinskih partnera Srbije, te da je za Srbiju od velikog značaja da sa Rusijom nastavi redovno da razmenjuje informacije i usklađuje aktivnosti u međunarodnim organizacijama po pitanju Kosova i Metohije.[21]

Istovremeno, mediji su dosta često i prenaglašeno pozitivno izveštavali o **zajedničkim projektima** Srbije i Rusije, preuveličavajući njihove koristi za srpsku stranu. Na primer, 2014. godine je potpisan Memorandum o razumevanju u oblasti energetske efikasnosti, uštede energije i obnovljivih izvora energije između Srbije i Rusije, što je predstavljeno kao korak ka unapređenju energetske efikasnosti zemlje iako ni deset godina kasnije nisu poznati niti zabeleženi bilo kakvi rezultati u realizaciji ovih projekata.[22] U novembru 2018. godine mediji su pisali propagandne hvalospeve povodom ugovora o proširenju podzemnog skladišta gasa „Banatski dvor“. Tim povodom srpska redakcija Sputnjika je

21 https://www.danas.rs/vesti/politika/vucic-rusija-je-strateski-partner-srbije/?utm_source=chatgpt.com

22 https://energetskiportal.rs/potpisan-memorandum-o-energetskoj-efikasnosti-izmedu-srbije-i-rusije/?utm_source=chatgpt.com

davala smernice ostalim medijima koji su ih po pravilu sledile. Tekst "**Strateški projekat: Pomoć Rusije za energetsku bezbednost Srbije"** od 13.11.2018. u kome se navodi: „Iako informacija da međudržavni sporazum o tranzitu gasa između Rusije i Ukrajine ističe 2019. godine zvuči kao nešto što je jako daleko od nas, građani Srbije koji su se devedesetih godina smrzavali tokom energetskih sankcija međunarodne zajednice, znaju da je i te kako važna za Srbiju", kombinuje dva narativa – o Rusiji kao pouzdanom parteru i sili zaštitnici Srbije i **neprijateljskom Zapadu** koji ima dugu istoriju nasrtaja na vitalne interese Srbije i srpskog naroda.[23]

U istom duhu nastavilo se i naredne 2019. godine kada je Sputnjik ponovo dao impuls medijima tekstom **„Rusija osigurava energetsku bezbednost Srbije"** u kome govori o sporazumu o gasu sa Rusijom i ulaganju 1,4 milijarde evra u srpsku infrastrukturu (gasovod za distribuciju ruskog gasa) koja će „osigurati energetsku bezbednost i značajno učvrstiti energetsku poziciju Srbije",što je izgovorila sagovornica Sputnjika Jelica Putnjiković.[24]

U medijima u to vreme bio je veliki broj prividno **neutralnih ili umereno pozitivnih tonova prema ruskim energetskim interesima.** Oni su po pravilu o ruskim energetskim interesima u regionu izveštavali bez kritičkog osvrta, često prenoseći stavove ruskih zvaničnika ili predstavnika kompanija. Ovakvi izveštaji su često naglašavali važnost ruskih energetskih projekata za regionalnu stabilnost i razvoj.

Retorika se značajno zaoštrila nakon početka otvorene **agresije Rusije na Ukrajinu**. Iako EU nije uvela sankcije na izvoz ruskog gasa, srpski mediji su insistirali na temi apokaliptičnih scenarija u slučaju uvođenja takve mere od strane Brisela. Tako su konstatovali da će se u Evropi „vrlo brzo doći do toga da će se pobuniti ne samo građani, već i privrednici, tražeći da se uvozi što jeftiniji gas" ili da bi potpuno odustajanje Evrope od ruskih energenata predstavljalo „nekakav **apokaliptični scenario**". Jedan od vodećih narativa bilo je veličanje pozicije Rusije koja navodno može da diktira jednostrane uslove Evropi i Srbiji poput, na primer, **odluke o plaćanju u rubljama** koja nikada u praksi nije zaživela. Spisak neprijateljskih država koji je formirao ruski predsednik Vladimir Putin za koje je odredio više cene gasa iskorišćeno je u Srbiji kao pretući argument protiv odluke o uvođenju sankcija Ruskoj Federaciji zbog agresije na Ukrajinu. U ovom slučaju je ponovljen argument da bi u slučaju sankcija na gas nastala apokalipsa, ali je naglašeno i da je bilo

23 https://lat.sputnikportal.rs/20181113/Srbija-Rusija-gas-skladiste-izgradnja-1117811772.html

24 https://lat.sputnikportal.rs/20190119/Rusija-Srbija-energetika-gas-1118561665.html

kakav pokušaj diversifikacije geopolitički projekat Evrope, a ne ekonomski i bezbednosni projekat u interesu Srbije.

U tom periodu su dominirali naslovi poput **„Putin naložio: Neprijateljske zemlje će plaćati gas u rubljama“[25], „Češki ekspert: Gotovo sve zemlje EU narušavaju zabranu uvoza ruskih energenata“[26],** kao i **„Novak: Evropa nema čime da zameni ruski gas“** u kome se prenosi izjava potpredsednika Vlade Rusije Aleksandra Novaka za televizijski kanal „Rusija 1“ da „Evropa neće uspeti da nađe zamenu za ruski gas u narednih pet godina“.[27]

U istom tonu bila je i izjava direktora Srbijagasa **Dušana Bajatovića,** poznatog po proruskim stavovima, da bi se dogodila apokalipsa u slučaju uvođenja sankcija Rusiji na izvoz gasa**.** „Histerija koja je proizvedena u Evropi i SAD ima više ciljeva. Pogledajte tu mržnju – izbacuju se ruski studenti, oduzima se privatna imovina… Kad se napravi takva histerija možete da donesete odluku kakvu god hoćete. Možete da donesete nelogičnu političku odluku i da je pravdate svom stanovništvu mržnjom prema nekoj zemlji“, poručio je Bajatović.[28]

Na temu plaćanja gasa u rubljama mediji su insistirali čak i onda kada je postalo jasno da je ta odluka praktično nesprovodiva i kada je i samo rusko rukovodstvo dopustilo širok spisak izuzetaka. **„Htela – ne htela, Evropa će morati da plaća gas u rubljama“,** analizirao je Sputnjik ističući da će Evropa „morati da plaća gas u rubljama, a to bi moglo da dovede do jačanja nacionalne valute i ruske ekonomije u celosti. S druge strane, ako bi Evropljani odbili plaćanje ruskog gasa u rubljama to bi moglo da izazove unutrašnje ekonomske i socijalne probleme u zemljama EU, ocenjuju ruski eksperti“. Pored konstatacije da **ruski gas nema alternativu, u tekstu je stajala i poruka za Srbiju:** „Čuli smo da je rukovodstvo Srbije izrazilo zabrinutost... Ali ako ste slušali pažljivo Putina, on je govorio o tome da se prelazak na rublje odnosi na zemlje koje nisu prijateljske Rusiji, odnosno na one koje su uvele sankcije Rusiji“.[29]

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25 https://lat.sputnikportal.rs/20220323/putin-nalozio-rusija-prevodi-placanje-za-gas-u-evropi-u-rublje--1135740567.html

26 https://lat.sputnikportal.rs/20230124/ceski-ekspert-gotovo-sve-zemlje-eu-narusavaju-zabranu-uvoza-ruskih-energenata-1149840303.html

27 https://lat.sputnikportal.rs/20220324/novak-evropa-nema-cime-da-zameni-ruski-gas-1135759504.html

28 https://lat.sputnikportal.rs/20220324/bajatovic-kad-bi-eu-uvela-sankcije-na-ruski-gas-dogodila-bi-se-apokalipsa-video-1135710517.html

29 https://lat.sputnikportal.rs/20220324/htela-ne-htela-evropa-ce-morati-da-placa-gas-u-rubljama-1135783002.html

Iako je Rusija zahtevala plaćanje gasa u rubljama, evropski kupci su, kroz različite mehanizme, nastavili da plaćaju gas u evrima ili dolarima, dok su ruske banke vršile konverziju u rublje. Međutim, nedavne sankcije i promene u ruskim propisima dodatno su zakomplikovale ove aranžmane, što je dovelo do prilagođavanja načina plaćanja kako bi se ispoštovali i evropski propisi i ruski zahtevi što je daleko od teze da je Rusija u poziciji da nameće svoje uslove evropskim kupcima.

Veličanje i preterivanje značaja Rusije u energetskom snabdevanju Evrope i Srbije išla su gotovo do mitomanskih razmera o čemu svedoči i autorski tekst proruskog agenta uticaja Aleksandra Đurđeva, predsednika minorne partije Srpska liga, ali sveprisutnog u provladinim medijima. U autorskom tekstu **„Partnerstvo Srbije i Rusije u energetici i nafti - starije od mnogih saveza i država“,** Đurđev postavlja pitanje i daje prilično sugestivne i politički obojene odgovore: „Pogledajmo današnju energetsku sliku Srbije. Naša zemlja potrebe za naftom zadovoljava na dva načina - iz sopstvene proizvodnje (oko 20%) i preko uvoza (oko 80%). Najviše nafte uvozimo iz Iraka (više od 60%), potom iz Rusije (preko 20%), a zatim slede Kazahstan (oko 10%) i Norveška (oko 3%). Kada je reč o gasu, naša zemlja oko 90% gasa koji troši dobija iz Rusije preko Turskog toka. Postavlja se opravdano pitanje - može li se naša zemlja odreći energetskog partnera poput Rusije, dakle prvog po važnosti za uvoz gasa (i nezamenljivog) i drugog po važnosti za uvoz nafte (takođe teško zamenljivog)? Odgovor je i više nego jasan - naravno da ne može, sem ukoliko ne želi da posluša zlunamerne delove kolektivnog Zapada i zada smrtonosni udarac svojoj privredi“.[30]

Prvi potpredsednik vlade i lider socijalista Ivica Dačić gotovo da nije propuštao priliku da dokaže svoje snažno zalaganje za jačanje saradnje u oblasti energetike sa Rusijom.[31]

U tekstu portala **standard.rs** pod naslovom **„Energetski rat Rusije i EU – Srbija između dve vatre“, autorka** Anica Telesković navodi: „Ukoliko bi Srbija Rusiji uvela sankcije, plaćanje gasa po tržišnoj ceni bilo bi veliki udarac za budžet. Cena gasa na tržištu za godinu dana porasla je i do 500 odsto“[32]. Slične apokaliptične ocene se iznose i za zemlje EU: „**FINANSIJSKI USLOVI SE POGORŠALI: Inflacija u evrozoni skočila na rekordno visok nivo“**,

30 https://pink.rs/politika/571701/aleksandar-durdev-partnerstvo-srbije-i-rusije-u-energetici-i-nafti-starije-od-mnogih-saveza-i-drzava

31 https://www.danas.rs/vesti/politika/dacic-za-jacanje-saradnje-u-oblasti-energetike-sa-rusijom/

32 https://standard.rs/2022/05/25/energetski-rat-rusije-i-eu-srbija-izmedju-dve-vatre/

navodeći da se finansijski uslovi ubrzano pogoršavaju, a neke zemlje se suočavaju sa rastom cena od više od 20%,[33] iako su sve relevantne analize pokazale da cene energenata gotovo da nisu imale uticaja na evropsku inflaciju izazvanu posledicama krize izazvane korona virusom.

Evropa se najčešće prikazuje kao nepouzdana i nesamostalna u donošenju odluka, a saradnja Srbije u energetskim projektima EU kao sterilna i beskorisna. U tom duhu su poruke tekstova „**Putin: Nemačkoj nedostaje suverenitet, ceo svet se smeje nekim njenim zvaničnicima“** od 29.11.2023. godine[34] i „**Srbija dobija novu gasnu infrastrukturu do Bugarske, ali gasa - nema“** od 02.02.2022. u kome se tvrdi da je u pitanju **insistiranje Brisela na geopolitičkom, a ne ekonomskom energetskom projektu.[35]**

U srpskim medijima javlja se i manipulativni spektar **demonizacije Zapada**, posebno Sjedinjenih Američkih Država koje se okrivljuju za širok spektar „nepočinstava“ koja im se pripisuju. U tekstu „**Velika Britanija odgovorna, a Amerika?**“, sajt **B92** prenosi tekst u kome se tvrdi: „SAD imaju najveću korist od eksplozija na gasovodima ‘Severni tok 1’ i ‘Severni tok 2’, ali je i Velika Britanija učestvovala“.[36] S druge strane Novosti poručuju: „**SVI ĆE ZNATI KO JE DIGAO U VAZDUH SEVERNI TOK: Rusija će izneti pitanje terorističkih napada u koje je bila umešana Velika Britanija“** u tekstu koji je preuzet od novinske agencije Tanjug 29. 10. 2022. godine.[37]

Na istom talasu plasiraju se narativi - SAD imaju značajan uticaj na energetsku politiku EU koja je žrtva nametanja američkih interesa; SAD žele da zamene Rusiju na evropskom tržištu gasa sa značajno višim cenama; te da **Amerikanci nude Evropi nešto čega nema - njihov „jeftiniji i bolji gas“ od ruskog.** Pod naslovom „**Ruski odjek u srpskim medijima“** tim NVO Crta ukazao je 13. 11. 2022. godine da su energija i energetska kriza jedna od ključnih tačaka u kojoj se prelamaju dezinformacije povezane sa ratom u Ukrajini. „Mnogi domaći mediji, među kojima su Informer, Novosti i Pink, uhvatili su se za upečatljiv primer raskrinkane ruske propagande i objavili da je u Švajcarskoj moguće prijaviti komšije koji pregreju svoje stanove i

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33 https://www.novosti.rs/ekonomija/vesti/1168476/inflacija-evropa-evrozona-italija-francuska-nemacka-energetska-kriza

34 https://lat.sputnikportal.rs/20231129/putin-nemackoj-nedostaje-suverenitet-ceo-svet-se-smeje-nekim-njenim-zvanicnicima-1164419984.html

35 https://lat.sputnikportal.rs/20220202/srbija-dobija-novu-gasnu-infrastrukturu-do-bugarske-ali-gasa---nema-1133917696.html

36 https://www.b92.net/o/info/vesti/index?yyyy=2022&mm=11&dd=03&nav_category=78&nav_id=2237091

37 https://www.novosti.rs/planeta/svet/1167902/marija-zaharova-velika-britanija-odgovornost-teroristicki-napad

dobiju nagradu od 200 evra, dok bi krivci za prekomerno trošenje energije mogli da završe u zatvoru. Mediji se nisu ustručavali ni od objavljivanja teorija zavere, poput one da su za sabotažu i eksplozije gasovoda Severni tok 1 i 2, odgovorne Velika Britanija i SAD, koju su objavile B92, Mondo i Novosti. Identična tvrdnja registrovana je istovremeno i na ruskim medijima".

Ponavljajuću priču da sankcije EU imaju efekat bumeranga i da više škode Evropi nego Rusiji, iznova su na destine puta prenosili srpski dnevni listovi uključujući Kurir i Večernje novosti. Ova neutemeljena poruka takođe se može povezati sa ruskim medijima, kao što je zabeleženo u bazi podataka EuvsDisinfo".[38]

U medijskom prostoru prisutni su narativi koji sugerišu da Sjedinjene Američke Države (SAD) imaju značajan uticaj na energetsku politiku Evropske unije (EU), te da je EU u tom kontekstu podređena interesima Vašingtona. Ovi narativi često ističu da SAD koriste svoju poziciju kako bi povećale izvoz svog tečnog prirodnog gasa (LNG) u Evropu, smanjujući time zavisnost EU od ruskog gasa, ali po višim cenama. Tekstovi poput „**Američki gas za Evropu — marketinški trik ili probni balon" od** 23.04.2016. godine[39], te „**Američki tečni gas — samo na papiru" u kome se navodi** da „tamo gde je cena nečega čak za trećinu niža od konkurentske jasno je da tu nema ekonomije. Čista politika. Kao sa američkim gasom Poljskoj. Jedini je problem što je Varšava dosad taj gas videla uglavnom na papiru"[40]. U istom duhu nadovezuju se i članci „**Iscurilo Bajdenovo obećanje: Američki tečni gas za Evropu - samo na kašičicu"[41],** kao i članak „**Analize u EU: Amerikanci sad glavni isporučioci gasa i nafte Evropi, ali cene jako visoke"** objavljen na portalu **«Danas»** u kome se ističe da su američke kompanije postale glavni isporučioci gasa i nafte Evropi, ali uz znatno više cene. Takođe se navodi da je američki politički uticaj na evropskom kontinentu porastao, posebno u kontekstu vojne zaštite Evrope zbog rata u Ukrajini. Ovaj izveštaj sugeriše da je rat u Ukrajini obogatio Ameriku, koja je postala glavni svetski izvoznik energenata i oružja.[42]

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38 https://www.istinomer.rs/analize/ruski-odjek-u-srpskim-medijima/?utm_source=chatgpt.com

39 https://lat.sputnikportal.rs/20160423/sad-evropa-gas-marketing-probni-balon-1105100857.html

40 https://lat.sputnikportal.rs/20181018/sad-gas-poljska--1117531558.html

41 https://lat.sputnikportal.rs/20220826/iscurilo-bajdenovo-obecanje-americki-tecni-gas-za-evropu---samo-na-kasicicu-1141653363.html

42 https://www.danas.rs/svet/analize-u-eu-amerikanci-sad-glavni-isporucioci-gasa-i-nafte-evropi-ali-cene-jako-visoke/?utm_source=chatgpt.com

Iako su afirmativni tekstovi dominirali, bilo je i medija koji su pružali kritičke analize energetskog partnerstva sa Rusijom. Ovi mediji su postavljali pitanja o prevelikoj zavisnosti Srbije od ruskih energenata i mogućim posledicama takve politike na dugoročnu energetsku sigurnost zemlje. Na primer, neki analitičari su isticali rizike od prekomerne zavisnosti od ruskog gasa i nafte, te potrebu za diversifikacijom izvora energije kako bi se smanjila energetska ranjivost zemlje. Primera radi portali poput "**Danas**" i "**Vreme**" su povremeno objavljivali analize koje su preispitivale ekonomske i političke aspekte energetske zavisnosti od Rusije, ukazujući na potencijalne rizike takve orijentacije.

Kritičkih osvrta je bilo i u stručnim radovima koji nisu imali veliku vidljivost u široj javnosti, ali predstavljaju izuzetno kvalitetnu bazu za dalja istraživanja i proučavanja. Da u odnosima između Srbije i Rusije nije baš sve tako blistavo i sjajno kakvim se predstavlja u proruskom delu javnosti, pokazao je tekst "**Odnosi Srbija–Rusija: Toplo – mlako – prohladno"** koji je objavio nedeljnik **Novi magazin.** Značajan trenutak su bile posledice posete predsednika Rusije Vladimira Putina Srbiji 2014, nakon koje je dve sedmice kasnije stigla prava poruka – Gasprom je tada smanjio isporuke gasa Srbiji, navodno zbog neplaćenog duga za gas iz 2000. godine", navodi se u tekstu i dodaje:

„Početak novog odnosa Srbije i Rusije, seže u 2007, kada se usled izvesnosti jednostranog proglašenja nezavisnosti Kosova, u političkom diskursu Srbije pojavljuje Rusija kao poželjni partner, predstavljena kao strana koja nudi rešenja za neke od političkih, ali i ekonomskih izazova. Ta nova era međusobnih odnosa rezultovala je Energetskim sporazumom iz 2008, kao 'cenom' ruske podrške Srbiji".[43]

Analizu **„ENERGETSKI KOLAPS UOČI RATA U UKRAJINI"** koju medijski konzumenti nisu moglo da vide u mejnstrim medijima u Srbiji, objavio je Helsinški odbor za ljudska prava. U opširnoj studiji se ukazuje na rastući deficit i izdatke Srbije za ruske energente koji je 2021. godine bio 1.516,9 miliona evra, da bi 2022. godine skočio na 3.920,1 miliona evra što je predstavljalo 44 odsto ukupnog trgovinskog deficita Srbije s inostranstvom! U studiji se takođe ukazuje da dok su jedni naglo poskupljenje energenata povezivali isključivo sa sankcijama "kolektivnog Zapada" prema Rusiji ("zaboravljajući" ruski rat u Ukrajini), drugi su akcenat isključivo davali lošem upravljanju javnim energetskim preduzećima, a treći su sve više izbegavali

43 https://novimagazin.rs/
iz-nedeljnika-nm/309694-odnosi-srbija-rusija-toplo---mlako---prohladno

energetske teme i dalje galamili o "reintegraciji Kosova" i svemoći ruskih tajnih projektila u nekom novom rasporedu svetske moći.[44]

S druge strane, **mediji koji su prednjačili u afirmativnim tekstovima su uglavnom** bliski vlastima i provladini tabloidi koji su gotovo isključivo objavljivali afirmativne tekstove o saradnji sa Rusijom, veličajući zajedničke projekte i ističući koristi od partnerstva. Ovi mediji su često prenosili izjave zvaničnika bez kritičkog osvrta, stvarajući sliku o Rusiji kao pouzdanom partneru i ključnom osloncu za energetsku sigurnost Srbije.

Ovakav pristup izveštavanju doprineo je formiranju javnog mnjenja koje Rusiju vidi kao ključnog partnera Srbije, dok se Zapad često percipira kroz negativnu prizmu i u negativnom kontekstu.

KLJUČNI MEDIJSKI AKTERI I NJIHOVE MANIPULATIVNE TEHNIKE:

Prema dominantnom narativu i vrednosno-političkom usmerenju moguće je identifikovati sledeće grupe medija i manipulativnih tehnika kojima se koriste u plasiranju političkih poruka:

1. Proruski mediji – oblikovanje proruskih narativa

Mediji u Srbiji koji se često percipiraju kao proruski su oni koji dosledno promovišu narative koji podržavaju ruske interese, pravdaju rusku spoljnu politiku, kritikuju Zapad (EU, SAD, NATO) i šire stavove koji su usklađeni sa ruskim geopolitičkim ciljevima. To uključuje teme kao što su energetska zavisnost od Rusije, negativan prikaz Zapada, podrška ruskoj invaziji na Ukrajinu, anti-NATO sentiment i teorije zavere o globalnim događajima.

Ovi mediji imaju značajan uticaj na oblikovanje javnog mnjenja u Srbiji, gde postoji tradicionalno pozitivan odnos prema Rusiji što se odražava i na energetsku bezbednost zemlje.

Proruski mediji u Srbiji koriste različite manipulativne tehnike za promovisanje ruskih interesa u energetici. Analizom sadržaja objavljenih tekstova na temu energetske bezbednosti Srbije identifikovane su sledeće glavne **tehnike manipulacije:**

- **Demonizacija Zapada** – EU i SAD se prikazuju kao nepouzdani partneri koji žele da oslabe Srbiju kroz energetsku zavisnost od njih;
- **Idealizacija ruskog partnerstva** – Rusija se predstavlja kao jedini iskreni saveznik Srbije, koji nudi „najpovoljnije" energetske aranžmane;

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44 https://www.helsinki.org.rs/serbian/doc/izvestaj%202022.pdf, str. 211

- **Teorije zavere** – često se plasiraju tvrdnje da „globalisti“ ili „geopolitičke elite“ žele da Srbija ostane bez gasa i struje;
- **Senzacionalizam i strah** – naslovi poput *„Evropska unija sprema energetski slom Srbije!“* ili *„Zapad nas tera u energetsku propast“* sračunati su na izazivanje panike i negativnih sentimenata prema zapadnim partnerima Srbije. Ako se ima u vidu da je članstvo u EU strateško opredeljenje Srbije onda je jasno da ovakvi naslovi imaju za cilj izazivanje dugoročnih posledica i uticaja na strateške odluke i orijentaciju Srbije i njene javnosti.

Najčešći narativi koje šire proruski orijentisani mediji jesu:

- “Rusija je jedini pouzdan energetski partner Srbije”, što se oslanja na tvrdnje da Zapad manipuliše cenama energenata, dok Rusija nudi stabilne i prijateljske uslove. Istovremeno se potpuno ignoriše činjenica da je Srbija energetski zavisna od ruskog gasa, što nosi rizike u kriznim situacijama.
- “Zapad nas ucenjuje zelenom tranzicijom” u okviru koga se zahtevi EU za smanjenje korišćenja uglja prikazuju kao pokušaj ekonomske destabilizacije Srbije. Takođe, prećutkuje se da je dekarbonizacija globalni proces i da zemlje koje je ignorišu gube pristup stranim investicijama.
- “Obnovljivi izvori su nesigurni i preskupi” sa očiglednim ciljem da se odloži energetska tranzicija i da se nastavi oslanjanje na ruske energente i fosilna goriva. U stvarnosti, mnoge zemlje smanjuju troškove prelaskom na OIE i povećanjem energetske efikasnosti.

2. Prozapadni mediji

S druge strane prozapdno orijentisani mediji promovišu EU integracije i energetsku diversifikaciju, ali ponekad koriste pristrasne i jednostrane metode i pristupe u izveštavanju. Oni stavljaju **fokus na sledeće teme:**

- **korupciju u energetskom sektoru** – ističu se afere i problemi sa državnim energetskim kompanijama, ali se ponekad preteruje u tvrdnjama;
- **Naglašavanje zavisnosti od Rusije** – često se prikazuje kao veća nego što jeste, ignorišući dugoročne planove i učinjene napore Srbije po pitanju za diversifikaciju;
- **Promocija zelene tranzicije kao jedinog rešenja** – bez dovoljno diskusije o izazovima koje ona nosi u Srbiji (nedostatak investicija, potreba za postepenim prelazom). Međutim, često se zbog potreba obračuna sa vlastima podržavaju lokalne inicijative koje se protive izgradnju mini hidroelektrana ili kopanju litijuma čime se gubi konzistentnost u u uređivačkoj politici;
- **Selektivno poređenje sa Zapadom** u kome se ističe kako su zemlje EU smanjile zavisnost od ruskog gasa, ali bez analize njihovih investicija koje Srbija još nema.

U ovoj grupi medija takođe postoje dominantni narativi:

- “Srbija mora smanjiti zavisnost od ruskog gasa” u okviru koga se ističu rizici oslanjanja na jednog dobavljača, što je tačno, ali se ponekad ignorišu realni troškovi i izazovi energetske diversifikacije;

- "Obnovljivi izvori energije su jedina budućnost Srbije" u kome se promoviše energetska agenta interesnih grupa i lobija bez dovoljno analize o realnim infrastrukturnim i finansijskim izazovima tranzicije.
- "EPS je u krizi zbog lošeg upravljanja, a ne globalnih faktora", gde se korupcija opravdano ističe kao veliki problem u EPS-u, ali se izostavlja činjenica da su i globalni energetski šokovi dodatno pogoršali situaciju.

Iako su manje prisutni, u Srbiji deluju i **kineski mediji** (***CGTN, China Daily, Global Times***) koji promovišu kineske investicije, iako su u pitanju pretežno krediti i pozajmice koje vraća Srbija, kao ključne za budućnost srpske energetike.

Osim klasičnih medija, ključnu ulogu u širenju dezinformacija imaju **društvene mreže i alternativni informativni kanali** sa različitim rasponima i frekvencijom dejstva:

- **Telegram i YouTube** – često se koriste za širenje proruskih teorija zavere o energetskoj krizi;
- **Twitter i Facebook** – postovi prozapadnih medija o energetskoj tranziciji često su predmet manipulacije i negativnih kampanja;
- **Influenseri i analitičari** – pojedini energetski „stručnjaci" na društvenim mrežama šire pristrasne informacije zavisno od svojih političkih veza i preference.

Ono što karakteriše stanje na ovom spektru savremenih medija jeste odsustvo uređenosti i regulative te mnogo veće prisustvo neproverenih informacija, lažnih vesti i dezinformacija. Ono što je zabrinjavajuće kada su društvene mreže u pitanju jeste to da, uprkos rastućoj nepouzdanosti, procenat populacije koji se pretežno informiše preko društvenih mreža beleži veliki i stalni rast.

PREPORUKE ZA BORBU PROTIV DEZINFORMACIJA U OBLASTI ENERGETSKE BEZBEDNOSTI

Dezinformacije u oblasti energetske bezbednosti mogu ozbiljno da ugroze proces donošenja racionalnih političkih odluka, stvoriti lažne predstave o energetskoj politici zemlje i izazvati nepotrebnu polarizaciju javnosti. Zbog toga je ključno razviti strategije koje će omogućiti građanima da prepoznaju manipulacije, a medijima i institucijama da osiguraju tačno i objektivno informisanje. Za kreiranje i sprovođenje svih mera neophodan uslov je postojanje političke volje i konsenzusa ključnih političkih i društvenih aktera.

Prva i najvažnija mera jeste sistematski i kontinuirani rad na **jačanju medijske i energetske pismenosti** čime se jača otpornost građana na negativne i

manipulativne medijske uticaje. Cilj ovih mera jeste da se razvije sposobnost građana da prepoznaju manipulacije u izveštavanju o energetici – da razlikuju pouzdane izvore od propagande, da prepoznaju manipulativne tehnike (klikbejt naslove, selektivno navođenje činjenica, preteranu dramatizaciju i korišćenje emotivnog jezika), da razlikuju političku agendu od stručne analize, pre svega kada je u pitanju širenje geopolitičkih narativa. Najzad, cilj edukacije mora da bude usmeren na razvijanje kritičkog mišljenja građana kroz školske programe, javne debate i kampanje o energetskoj pismenosti kako bi građanstvo steklo bolje razumevanje energetske politike i otpornost na propagandu.

Druga važna mera jeste **razvoj fact-checking platformi, njihove metodologije** i odgovornosti medija. Ovaj aspekt se postiže sistemskom podrškom nezavisnim fact-checking inicijativama, boljom regulacijom medijskog izveštavanja o energetici, uvođenjem energetskih stručnjaka u medijsko izveštavanje i sankcionisanjem širenja lažnih informacija.

Treći važan segment jeste zajednička uloga i **saradnja države i civilnog sektora**. U kreiranju politike suzbijanja dezinformacija bez narušavanja slobode medija ključni koraci jesu podizanje transparentnosti u radu državnih institucija, podsticanje nezavisnog novinarstva, jačanje digitalne pismenosti kroz obrazovni sistem i kontinuirana dvosmerna saradnja i komunikacija sa civilnim sektorom.

Najzad, važan segment suzbijanja lažnih vesti i hibridnih pretnji jeste **međunarodna saradnja** koja podrazumeva preuzimanje dobrih praksi u borbi protiv energetskih dezinformacija, učenje iz iskustava drugih zemalja, saradnju sa međunarodnim organizacijama, regionalnu koordinaciju u borbi protiv dezinformacija i uključivanje platformi društvenih mreža koje mogu biti ključni partneri u borbi protiv plasiranja lažnih informacija o energetici putem online kanala.

Borba protiv dezinformacija u oblasti energetske bezbednosti zahteva multidisciplinaran pristup koji uključuje obrazovanje, odgovorno novinarstvo, regulatorne mere i međunarodnu saradnju. Ključni izazov je razviti efikasne mehanizme suzbijanja manipulacija bez ugrožavanja slobode medija i izražavanja. Jačanjem medijske i energetske pismenosti, podrškom fact-checkingu i unapređenjem državne i međunarodne koordinacije, može se smanjiti uticaj lažnih narativa i osigurati objektivno informisanje građana o ključnim energetskim pitanjima.

ZAKLJUČAK

Analiza dezinformacija o energetskoj bezbednosti Srbije pokazala je da je ova tema visoko politizovana i često predmet manipulacija u javnom diskursu. Medijski narativi o energetskoj zavisnosti, stranim uticajima, obnovljivim izvorima energije i geopolitičkim pritiscima oblikuju percepciju građana i utiču na donošenje odluka, kako na individualnom, tako i na državnom nivou.

Proruski i prozapadni mediji kreiraju suprotstavljene narative, pri čemu jedni ističu pouzdanost ruskog snabdevanja i navodnu neodrživost zelene tranzicije, dok drugi naglašavaju potrebu za diverzifikacijom energetskih izvora i usklađivanjem sa evropskim standardima. Pored toga, različite interesne i političke grupe, botovi, trolovi i lobisti koriste medije i društvene mreže kao moćno sredstvo za širenje propagande, često bez ikakvih proverenih činjenica.

Prisutnost dezinformacija u energetskom sektoru nosi ozbiljne posledice po javne politike i dugoročnu strategiju energetske stabilnosti Srbije. Stoga je neophodno uložiti napore u sprovođenje mera efikasne borbe protiv ovog negativnog društvenog fenomena. Takođe, razmena dobrih praksi u borbi protiv dezinformacija na unutrašnjem i međunarodnom planu mogu doprineti smanjenju negativnog uticaja manipulativnih sadržaja i omogućiti donošenje informisanih i održivih energetskih politika.

Energetska bezbednost Srbije nije samo tehničko pitanje – ona je postala poligon za dezinformacije, propagandu i političku manipulaciju, što dugoročno utiče na donošenje ključnih odluka za budućnost zemlje. Dezinformacije o energetskoj bezbednosti u Srbiji često su usmerene na stvaranje geopolitičkih tenzija, ekonomske nesigurnosti i otpora reformama. Ključno je jačanje medijske pismenosti i objektivnog izveštavanja kako bi se javnost zaštitila od manipulacija i donela informisane odluke o budućnosti energetske politike.

Borba protiv dezinformacija u oblasti energetike nije samo pitanje medijske odgovornosti, već i ključni faktor nacionalne bezbednosti, ekonomskog razvoja i međunarodne pozicije Srbije zbog čega joj treba posvetiti značajno viši stepen društvene pažnje.

Energetika kao sredstvo ruskog hibridnog uticaja na Balkanu

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Poslednjih godina sve češće se čuje izraz hibridni ratovi, hibridni uticaji ili sukobi. Taj izraz koji je relativno nov, a popularisao ga je politički naučnik Mark Galeoti[1], ubrzo nakon ruske invazije na Ukrajinu 2014. godine.

Uprkos činjenici da je taj izraz relativno nov, metodi kojima se služe oni koji koriste hibridne metode su odavno poznati. Propaganda, dezinformacije, ekonomski pritisci, politički pritisci, sve je to lepeza metoda kojima jedna država može da utiče na politiku i društvo druge nacije.

Prema mišljenju autora ovog teksta, hibridne ratove možemo definisati kao "korišćenje svih raspoloživih sretava protiv suparnika, do tog nivoa da ne izazove otvoreni oružani odgovor".

To znači da su hibridne metode pritisci na neko društvo, kako bi se povinovalo ili vodilo politiku u skladu sa interesima države koja sprovodi hibridne metode, koristeći različite vrste sredstava. Od najpoznatijeg korišćenjem propagande i dezinformacije, kako bi ciljano društvo poprimilo javni narativ koji odgovara naciji koja koristi hibridna sredstva, preko privrednih, političkih i svih lepeza različitih vrsta pritisaka. Poslednjih godina, iliti decenija, jedna od najvažnijih vrsta hibridnih pritisaka jeste preko energetike i energetske zavisnosti neke države.

Važno je i napomenuti da su hibridne metode "long game", odnosno daju efekta u dugoj igri, treba vremena i upornosti da se postignu željeni efekti, ali isto tako moraju biti vrlo prilagodljivi, kako bi se u skladu sa političkom i društvenom situacijom u ciljanoj državi, menjali i usklađivali.

Upravo činjenica da hibridna sredstva idu do određenog nivoa, kako se ne bi prešla granica i javno mnjenje u ciljanoj državi ne bi se okrenulo protiv te države i njenih metoda, hibridni pritisci rastu, stiču uticaj, ali isto tako, kada

1 'Hybrid War' and 'Little Green Men': How It Works, and How It Doesn't https://www.e-ir.info/2015/04/16/hybrid-war-and-little-green-men-how-it-works-and-how-it-doesnt/MARKGALEOTTI, APR162015/

se primeti da javno mnjenje počinje negativno da reaguje, oni se smiruju, pritisak se olakšava, sve dok se javno mnjenje ne primiri, a onda se nastavljaju. Iz tih razloga u hibridnim sukobma je izuzetno važno pratiti javno mnjenje i stavove establišmenta, kako se ne bi izazvao bes i neki odgovor, već dizanjem i spuštanjem pritiska, dugoročno "gurnuti" tu državu koristeći hibridne metode u pravcu koji želi država koja sprovodi hibridne metode.

S tim na umu, kada se govori o energetici kao metodu hibridnih sukoba, odnosno širenja uticaja na drugu državu i uticaj na njenu politiku, tu je standarde poslednjih decenija postavila Ruska Federacija.

Zbog činjenice da je iz Hladnog rata izašla poražena, sa relativno velikim stanovništvom, ali ipak veličine manje od populacije Francuske i Nemačke, sa privredom koja je i dan-danas u svetskim okvirima relativno mala (u odnosu na EU je oko 8 puta manja, a u odnosu na SAD gotovo 12 puta manja[2]), Rusija nije imala puno izbora na koji način da širi svoj uticaj van granica. Ne samo oružjem, već i pre sukoba sa Zapadom nečim čega ima u izobilju. Energetikom.

Rusija se prema zalihama prirodnog gasa nalazi na prvom mestu u svetu. Sa 1,668,228,000 miliona kubnih stopa dokazanih rezervi prirodnog gasa, odnosno 24,3 procenta svetskih zaliha prirodnog gasa[3]. Što se tiče proizvodnje prirodnog gasa, Rusija se nalazi na drugom mestu iza SAD.

Kada se govori o nafti, Rusija se tu takođe nalazi pri vrhu, ali ne tako ubedljivo. Po dokazanim rezervama nafte, Rusija se nalazi na osmom mestu, sa oko 4,8 procenata svetskih rezervi nafte[4]. Po proizvodnji nafte, sa oko 10,75 miliona tona dnevne proizvodnje[5], nalazi se na trećem mestu iza Sjedinjenih Američkih Država i Saudijske Arabije.

Sve to je osim finansijske koristi, donosilo Rusiji i ogromnu političku pomoć. Mogla je da utiče na evropsku politiku. Još početkom 1970-ih godina prošlog veka i dolaska Vilija Branta na mesto kancelara Savezne republike Nemačke, počela je Istočna politika i privredno povezivanje Nemačke sa tadašnjim SSSR, a sada Rusijom. Prevashodno preko naftovoda i gasovoda koji su jeftinim energentima snabdevali najsanžniju evropsku privredu.

To se nastavilo i posle raspada SSSR i kraja Hladnog rata, pokušavajući da sa jedne strane Evropa dobije jeftine ruske energente, a sa druge strane

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2 Top 15 Countries by GDP in 2024
https://globalpeoservices.com/top-15-countries-by-gdp-in-2024/

3 Natural Gas Reserves by Country
https://www.worldometers.info/gas/gas-reserves-by-country/

4 Russia Oil https://www.worldometers.info/oil/russia-oil/#oil-reserves

5 What countries are the top producers and consumers of oil?
https://www.eia.gov/tools/faqs/faq.php?id=709&t=6

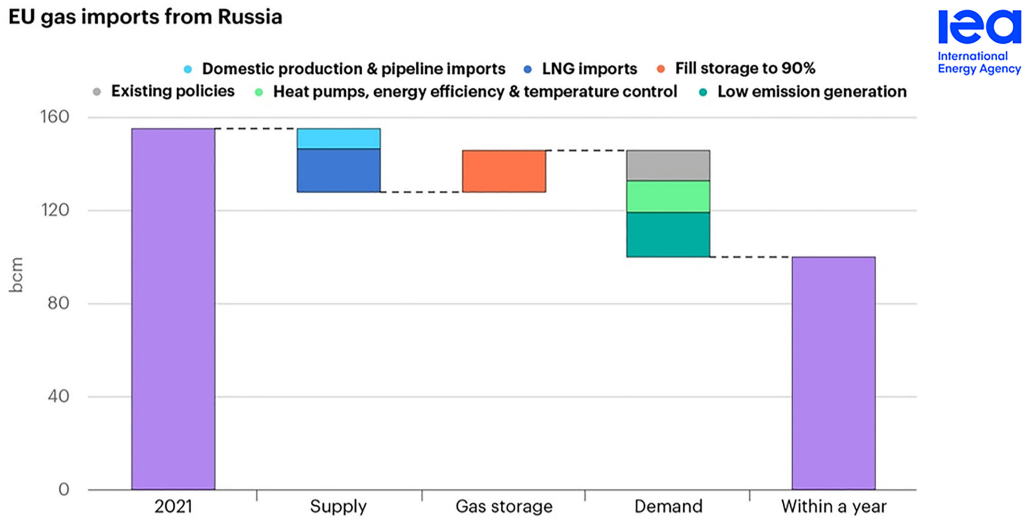
tako integriše Rusiju i rusku elitu u zapadni sistem, kroz velike poslove, ulaganja, ne samo u Rusiju, već i zapadne prestonice i odmarališta od strane ruske elite, da se tako dva sistema povežu i tako spreče moguće sukobe. To se pokazalo kao ogromna greška.

Sa gradnjom Severnog toka 1 i gotovo završetka Severnog toka 2, Nemačka je prevashodno postala zavisna od jeftinog ruskog gasa, koji je mnogo pomagao njenoj privredi. Ali je i postala zavisnik od ruskog gasa, što je u Kremlju naravno primećeno, te je i to bio jedan od razloga zašto se odlučilo na invaziju na Ukrajinu 2022. godine, jer se između ostalog smatralo i da zbog duboke zavisnosti većeg dela Evrope od ruskih energenata i njihove neophodnosti za privredni i industrijski sistem Evrope, prevashodno Nemačke, neće biti prevelikih otpora ruskoj invaziji i zauzimanju Ukrajine.

To je bila još veća greška i pogrešna procena od strane Kremlja. Krčag je polomljen, a da se negde u budućnosti vrati stara zavisnost Evrope od ruskih jeftinih energenata je malo ili gotovo nemoguće zamisliti. Da, moguće je da će u budućnosti kupovati Evropa ruske energente. Ali isto tako nikada više neće dozvoliti takvu zavisnost kao pre rata u Ukrajini i haosa koji je to napravilo.

Tokom godina, energetika je postala potentno oružje Rusije u odnosima sa Evropom. Pred invaziju na Ukrajinu, Rusija je prema procenama snabdevala EU sa oko 90 procenata nafte i oko 40 procenata prirodnog gasa koji se uvozio, a koji je dolazio iz ove zemlje. Ruski državni gigant Gazprom je bio na čelu ove invazije ruskih energenata na zemlje prevashodno Centralne i Istočne Evrope.

Koliko je Evropa postala zavisna od ruskog gasa, vidi se iz grafikona ispod.



Gotovo potpuna zavisnost dela Evrope od ruskih energenata, pogotovo Nemačke, verovatno je i bio jedan od argumenata za Vladimira Putina da otpočne invaziju na Ukrajinu 2022. godine, jer se verovatno smatralo da zbog te energetske zavisnosti, evropske nacije neće biti voljne da ulaze u konflikt sa Ruskom Federacijom, te će okupacija Ukrajine proći verovatno, relativno glatko.

Ali taj plan je potpuno omanuo, invazija na Ukrajinu i njeno brzo osvajanje je propalo, a Evropa je pokrenula dug, donekle mukotrpan posao odvikavanja od jeftinih ruskih energenata i brzog prelaska na obnovljive izvore energije, prevashodno sunca i vetra.

Balkanski gambit i meka moć

Gde se u toj celoj globalnoj borbi titana nalazio i nalazi trenutno Balkan? Uticaj Rusije na prostorima Balkana nije nikakva novina. To je istorijska paradigma. Samo se tokom decenija i vekova taj uticaj održavao na različite načine.

Za Rusiju je od sredine 19. veka Balkan imao strateški značaj, zbog moreuza na jugoistoku poluostrva koji su omogućavali neprijateljskim silama ulazak u Crno more, ali i prolaska preko Balkana ka Bliskom istoku i Kavkazu konkurentskih evropskih sila.

Još tada Rusija je, kao i druge evropske sile, koristila metode, koje bi savremena politička nauka opisala kao hibridna dejstva. Kao jedna od najmoćnijih sila u 19. i većem delu 20. veka, Rusija je koristila želje balkanskih naroda da se oslobode vlasti Otomanske imperije ili Austrougarske, a s obzirom da je većina stanovništva Balkana pravoslavne vere ili slovenskog porekla, korišćeno je ono što se danas naziva meka moć, odnosno moć privlačenja. Rusija se prikazala kao zaštitnik slovenskih i pravoslavnih naroda Balkana, ne samo iz emotivnih razloga, da zaštiti "sabraću" sa Balkana, već najviše iz praktičnih razloga, kako bi koristila emocije i želje balkanskih naroda za svojim oslobođenjem ili ujedinjenjem, da proširi uticaj na ovaj deo Evrope. I to je veoma uspešno u tom periodu, na prelazu iz 19. u 20. vek učinila. Prevashodno razvijajući vrlo bliske i kako se mislilo zaštitničke odnose sa Srbijom i Bugarskom, koje ne samo da su pravoslavne i slovenske nacije, već i vrlo važne bile u geostrateškom smislu za Rusiju u tom trenutku. Bugarska zbog svoje blizine moreuzima Bosfor i Dardaneli, toliko strateški važnima za bezbednost Rusije, ali i Srbijom koja ne samo da je želela da unutar Balkana oslobodi svoje sunarodnike od Otomanske imperije, već i bila je na samim granicama Austrougarske, drugog velikog

rivala Ruske imperije na Balkanu. Grčka je takođe povremeno bila u fokusu ruske politike, ali u mnogo manjem obimu, jer zbog same prirode svog položaja na obalama Mediteranskog mora, Grčka je bila pod velikim uticajem Velike Britanije, čija je mornarica praktično bila garant njene bezbednosti i suverenosti.

Sa propašću Ruskog carstva i nastanka boljševičke Rusije, taj uticaj na Balkanu je umanjen do kraja Drugog svetskog rata. Nakon toga, ceo Balkan, osim Grčke, potpada pod interesnu sferu i kontrolu SSSR, ali Jugoslavija, pod kontrolom komunista i Josipa Broza Tita uspeva 1948. godine da se izvuče iz naručja Moskve i vodi koliko-toliko nezavisnu politiku od Kremlja.

To ne znači da je sovjetska Rusija bila odustala od povratka kontrole nad Jugoslavijom. Pokušavala je na različite načine, danas bi ih nazvali hibridnim ratom. Pritiscima svake vrste, od pretnje vojnim napadom, ekonomskim, obaveštajnim, subvezivnim, propagandnim, godinama, ako ne i decenijama stvarala je nestabilnost u ovoj državi, kako bi tim pritiscima uspela da je privoli svojoj volji. Ali je omanula.

Sve to pokazuje da je prostor Balkana oduvek bio u fokusi interesa Rusije i deo planova njene nacionalne bezbednosti. To se nastavilo i nakon kraja Hladnog rata i raspada Sovjetskog saveza, kada nastaje Ruska federacija.

Iako značajno oslabljena nakon Hladnog rata, Rusija se nije odrekla svojih ambicija. Sada ne u smislu da agresivnim širenjem poveća svoju interesnu sferu, već da rubne države, pogotovo oko Crnog mora, oduvek slabe strateške tačke Rusije, nekako zadrži ne toliko pod svojom kontrolom, već pod svojim uticajem i da koliko može spreči ih da se odvoje od nje, postanu deo Zapada, odnosno evroatlanskog sistema, oličenog u NATO i Evropskoj uniji.

I to je pokušala na različite načine, negde ratom, kao u Gruziji, Moldaviji i sada Ukrajini, a negde koristeći svoje tradicinalne metode subverzije, propagande, političkog ili privrednog pritiska. Ono što danas nazivamo hibridnim metodama.

To je i urađeno na Balkanu. Svesna da svoju moć više ne može da projektuje daleko i da nije dovoljno snažna i bogata da utiče na okolne države u smeru da idu u kom ona želi, kao i u ostatku Evrope i na Balkanu, Rusija se pravashodno fokusirala na širenje svoje energetske moći, kao deo hibridnog širenja uticaja, kako bi lokalne elite učinila zavisnima od nje. I energetski, kupovinom energetskih kompanija, ali i koruptivno, koristeći prihode iz tih kompanija da potkupljuje lokalne elite.

NIS (ni)je naš

Jednog prohladnog januarskog dana 2008. godine, u Moskvi se okupila zanimljiva družina. Gosti ruskog predsednika Vladimira Putina bili su predsednik Srbije Boris Tadić i premijer Srbije Vojislav Koštunica.

Razlog posete bilo je sklapanje po nekima istorijskog, najavljivanog kao posao veka, po drugima katastrofalnog, ali svakako strateškog, sporazuma između Srbije i Rusije. Energetski sporazum između dve zemlje trebao je da bude potvrda čvrstih veza između dve države, ali i predaja srpske energetike u ruske ruke. A time dobrim delom i politike. Tim sporazumom je dogovorena prodaja većinskog dela srpske Naftne industrije Srbije, praktično monopoliste u preradi i prodaji naftnih derivata u zemlji ruskom energetskom gigantu Gaspromu, kao i izgradnja ruskog Južnog toka, odnosno gasovoda kroz Srbiju (projekta koji je kasnije neslavno propao), ali i izgradnja skladišta gasa u Banatskom dvoru, dok je srpska rudna renta ostala na minimalnih tri posto, daleko ispod svih svetskih standard u ovoj oblasti.

Zauzvrat, od ruske strane Srbija je očekivala podršku u svetskoj političkoj arena i pogotovo Savetu bezbednosti Ujedinjenih nacija oko pitanja Kosova i Metohije. Energetski, ali i umnogome politički dogovor, čime je Srbija predala energetiku u ruke Rusije, a sa druge strane bila zavisna od Rusije i njenog političkog stava u vezi rešavanja gorućeg političkog problema u Srbiji.

Potpisivanje energetskog sporazuma Srbije i Rusije pratila su i anegdotska dešavanja, koja pokazuju kolika je želja srpskog političkog vrha bila da se svako pokaže što bližim Rusiji. Radi javnog mnjenja, glasova, što je sve sa uživanjem pratila ruska strana. Tadić i Koštunica su se utrkivali ko će da sedne u jednu postavljenu stolicu pored Putina, pa je protokol morao da rešava situaciju. Iako to deluje možda šaljivo, uopšte nije bilo. Ko sedi pored Putina, taj je u percepciji građana Srbije bio bliži njemu i imao njegovu podršku. Sve to je omogućavalo Ruskoj federaciji da pokaže svoju moć u Srbiji, na Balkanu i omogući širenje potom svog uticaja na ovaj region sveta. Prodaju NIS-a su potom, na kraju te 2008. godine potpisali tada novi predsednik Ruske federacije Dmitri Medvedev (Putin je u čuvenoj rokadi otišao na mesto premijera) i predsednik Srbije Boris Tadić.

Te iste godine Srbija je i sa Evropskom unijom potpisala Sporazum o stabilizaciji i pridruživanju, čime se privredno vezala za EU, ali je u jednom od najvažnijih sektora, energetskom sektoru, postala potpuno zavisna od Kremlja. Kao i u političkom smislu, u vezi pitanja Kosova. Dovoljno je takođe

samo pomenuti i da je srpska naftna industrija (NIS), preko poreza i akciza, zaslužan za punjenje gotovo četvrtine budžeta Republike Srbije[6].

Srbija nije jedina zemlja, gde je na ovaj način, ne tvrdom silom, već mekom moći, hibridnim metodama, Rusija širila uticaj na Balkanu. Kao što je pomenuto, zemlje Zapadnog Balkana su tradicionalno fokus ruskih interesa, sa velikim istorijskim vezama. Meku moć Rusije na Balkanu nikada nije trebalo potcenjivati.

Upravo su ti hibrdini metodi, tihi i polagani ulazak Rusije kroz privredne, energetske, kulturne i političke dogovore sa elitama Balkana, omogućilo joj da nađe novo uporište u svom, mnogi tada nisu tako videli, ali su neki predvideli, sukobu sa Zapadnim svetom, što je kulminiralo ratom u Ukrajini.

Upravo je glavno sredstvo Rusije na Zapadnom Balkanu, osim istorijskog sentimenta, zajedničke slovenske ili pravoslavne veze, energetika bila ta koja joj je omogućavala da je kao meku moć ili hibridno sredstvo, pojedine zemlje Balkana, prevashodno Srbiji i BiH na neki način uvede u svoju zonu interesa, odnosno ne da bude neko ko može presudno da utiče na njihove politike, već da bez ruskog odobrenja ne može da se donese nijedna značajna odluka.

Kontinuirano prisustvo energetskih kompanija iz Ruske federacije u Srbiji, Severnoj Makedoniji, Bosni i Hercegovini, Bugarskoj ili Grčkoj, prevashodno kroz ruske naftne gigante Gasprom i Lukoil, omogućilo je Kremlju da širi svoj uticaj na ovaj region, na njegovu ekonomiju i politiku, donošenje ili možda bolje reći, nedonošenje strateških političkih odluka.

Balkanski deo gasovoda Turski tok radi u gotovo punom kapacitetu, a kroz njega godišnje prođe preko 12 milijardi kubnih metara ruskog gasa. Glavni kupac ovog gasa je Budimpešta, ali i okolne zemlje kroz koje prolazi.

Tako je Turski tok snabdevao Srbiju sa oko 2 milijarde kubnih metara godišnje, što je dovoljno da podmiri srpske potrebe.

Međutim, doba medenog meseca i nesmetanog ruskog uticaja preko energetike, koristeći hibridna sredstva na pojedine balkanske zemlje, pogotovo Srbiji, izgleda da prolazi. Prvo, nakon početka invazije na Ukrajinu i sankcija od strane Zapada koje su usledili.

Tako je Gasprom ubrzo po invaziji prodao deo svoji akcija u NIS Srbije, te sa 56, spao na 50 procenata vlasništva, dok je šest procenata prodato firmi registrovanoj u Nizozemskoj, za koju se smatra da je povezana sa Gaspromom.

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6 Western Balkans must pursue more competitive energy sectors, By Matthew Bryza
https://www.atlanticcouncil.org/in-depth-research-reports/issue-brief/western-balkans-must-pursue-more-competitive-energy-sectors/

Sa druge strane, u Bugarskoj još jednoj tradicionalno proruskoj državi, gde je rusofilija možda i najjače bila izražena tokom decenija, ruski uticaj preko energetike je postao tokom godina sve značajniji i sveprisutniji. Iako u Evropskoj uniji i NATO paktu, politička situacija u Bugarskoj je omogućavala da uprkos upozorenjima od strane EU i SAD, zavisnost od ruskih energenata nije presahnula.

Bugarska je takođe, kako kažu pojedini eksperti, poznata po sumnjivim vezama i kombinacijama između vladinih zvaničnika i njihovih ruskih kolega[7]. Pogotovo u energetskom sektoru.

Tako je jedan bivši bugarski ministar energetike našao se pod sankcijama Sjedinjenih Američkih Država, po takozvanom Magnitski Aktu, kojim se sankcionišu političari u svetu koji su pod sumnjom za korupciju, a prevashodno se odnosi na one koji imaju korupcionaške dilove sa Rusijom, po mišljenju Ministarstva finansija SAD. On je sa još dvojicom bugarskih funkcionera osumnjičen za koruptivni ugovor sa ruskim gasnim i snabdevačem nuklearnog goriva, a u vezi Kozloduja, bugarske nuklearne elektrane.

Do rata u Ukrajini, najnovijeg, Rusija je održala visoko prisustvo u Bugarskoj, pogotovo energetskom sektoru. Tako je u ruskom vlasništvu rafinerija Neftočim u Burgasu, na obali Crnog mora. Iako su se pojavile informacije da bi bugarska vlada mogla da nacionalizuje rafineriju, kako bi iz nje izašao ruski kapital, to do sada nije urađeno. Iako su se pojavile neke kompanije, odnosno države iz takozvanog bivšeg SSSR bloka, koje su voljne da kupe ovu rafineriju[8]. Da li bi to stvarno bio izlazak ruskog kapitala iz jedine bugarske rafinerije koju poseduju, ili samo preko posrednika zadržavanje kontrole, ostaje nam da vidimo.

I po otpočinjanju rata u Ukrajini 2022. godine, ruski uticaj u bugarsko, gasnom sektoru je rastao zahvaljujući poverljivom sporazumu iz januara 2023. godine između gasnih monopola Bugarske i Turske[9]. Ovim sporazumom je praktično na mala vrata preko interkonekcije između Turske i Bugarske,

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8 Kazakh company reportedly bidding for Bulgaria's only refinery
https://www.euractiv.com/section/politics/news/kazakh-company-reportedly-bidding-for-bulgarias-only-refinery/

9 Western Balkans must pursue more competitive energy sectors, By Matthew Bryza
https://www.atlanticcouncil.org/in-depth-research-reports/issue-brief/western-balkans-must-pursue-more-competitive-energy-sectors/

ruski gas nesmetano nastavio da plovi ka Bugarskoj. Prema sporazumu, bugarska strana treba da prihvati bilo koji gas koji dolazi iz tuskog gasovoda, bez obaveze da se otkrije poreklo gasa. Ostala je velika sumnja da će upravo ruski gas ići gasovodom iz Turske ka Bugarskoj i tako nastaviti Bugarsku zavisnost od ruskih energenata, ali i da će na "mala vrata" ruski gas, preko Bugarske nastaviti da teče prema Evropi. Sve to je dovelo do toga da bugarska strana postane predmet istrage Evropske komisije, zbog sumnje da kršenje EU pravila.

Možda nigde ruski uticaj na energetiku nije bio tako sveobuhvatan i snažan koliko na Bosnu i Hercegovinu. Državu podeljenu u dva entiteta, koju upravo nesporazum, često podstican sa strane, između tih entiteta, Republike Srpske i Federacije BiH, drži i dalje zarobljenom, decenijama posle potpisivanja Dejtonskog sporazuma i mira. Zemlje koja je i dalje daleko od članstva u Evropskoj uniji i NATO.

Još 2007. godine ruska kompanija kupila je celokupnu naftnu industriju Republike Srpske. Odnosno Rafineriju nafte u Brodu, Rafineriju ulja u Modriči i preduzeće za distribuciju nafte i naftnih derivate "Petrol". Time je celokupan nafni sektor u ovom delu BiH prešao u rusko vlasništvo.

Ni drugi deo države, Federacija BiH nije ostala imuna na ruski uticaj u energetskom sektoru. Preko posrednika, odnosno kompanija iz drugih država EU, u čije je vlasništvo ušla, jedna ruska kompanija ušla je u vlasništvo Energopetrola, glavnog distributera naftnih derivate u ovom delu zemlje. Ali posle nekoliko godina, ova ruska kompanija izašla je iz akcionarskog dela krovne kompanije.

Bez obzira na to, Bosna i Hercegovina, a pogotovo Republika Srpska ostaju čvrsto vezani uz Rusiju, ne samo zbog potencijalnog snabdevanja nafte i gasa, iako sada dobrim delom prekinutog zbog odluka Evropske komisije posle napada Rusije na Ukrajinu, već kao neki od najvrednijih privrednih segmenata u državi, preko kojih se finansiraju mnogi projekti, društveni događaji, političke partije ili javne ličnosti. A sve to koristi širenju uticaj Rusije u ovom društvu na duži rok, što čak nije ni velika tajna.

Iako su ruske investicije u region porasle tokom godina u većini segmenata, ruski uticaj u privredi u totalu na Zapadnom Balkanu se smanjio i stagnira, rezultati su istraživanja Evropskog parlamenta[10]. To se već moglo videti 2014. godine posle prve ruske invazije na Ukrajinu i zauzimanja

10 Russia's influence in the Western Balkan
https://www.europarl.europa.eu/RegData/etudes/ATAG/2022/733523/EPRS_ATA(2022)733523_EN.pdf

Krima, uz dve istočne oblasti Ukrajine. Dotadašnji bum u ruskim investicijama, odnosno ulaganjima prevashodno u energetiku u regionu Zapadnog Balkana počinje da stagnira. Vreme idealističnog odnosa između Zapada i Rusije, a samim tim i Balkana prestaje. Svi sa oprezom počinju da gledaju na ruske namere u budućnosti, koje su kulminirale punom invazijom na Ukrajinu 2022. godine.

I iako su mnogi stručnjaci, pogotovo iz Centralne i Istočne Evrope još krajem 1990-ih i početkom 2000. godina upozoravali da je ruska ekspanzija energenata u stvari njihovo sredstvo da prošire svoju moć hibridnim sredstvima, kroz stvaranje zavisnosti drugih zemalja i koruptivne poslove sa njihovim elitama, niko to ozbiljno tada nije shvatao.

Smatralo se da Rusija nema šta drugo da ponudi svetskom tržištu osim jeftinih energenata i to je bio način da se Rusija veže za Zapad, tačnije Evropu, kroz gradnju naftovoda, gasovoda, dati na taj način Rusima i njihovim elitama način da se bogate (a zapadne zemlje, pogotovo Nemačka dobiti jeftine energente), te da će se tako uvući i uklopiti u zapadni sistem.

Vrhunac nemačke politike "Wandel durch Handel", odnosno "trgovinom do promena", odnosno mira, koja je tako sjajno uspela na nemačko-francuskom primeru, te kasnije sa Sovjetskim savezom, pokazala se kao potpuni promašaj u slučaju Putinove Rusije.

Ali za to vreme dok su se političari zanosili idejom da će se puštanjem ruskog energetskog krvotoka u Evropi i Balkanu, Rusija promeniti, ona to nije učinila, već je svoje hibridne metode, kroz korupciju, kupovinu, propagandu i dezinformacije, tako brižljivo negovala po Zapadnoj Evropi, pa i SAD. A onda je došlo grubo otrežnjenje u obliku ruske invazije na Ukrajinu 2022. godine.

A do tada Rusija je duboko ušla i raširila svoj uticaj po Zapadnom Balkanu. Prema relevantnim procenama, ruski energetski uticaj najveći je u Srbiji, Severnoj Makedoniji i Bosni i Hercegovini, gde su (pre najnovijeg rata u Ukrajini) snabdevali tržište sa gotovo 100 procenata gasa[11].

Dominacija Rusije u gasnom sektoru, a dobrim delom i na naftnom u regionu Zapadnog Balkana bila je neupitna i veoma upečatljiva.

U nedostatku sankcija protiv ruskog gasa, sa početkom rata u Ukrajini, a dobrim delom i sada, Balkan je ostao značajno tržište za ruske energetske kompanije. Međutim, prevashodno zbog protivljenja američke strane, u osvit rata u Ukrajini, vlade regiona su morale pažljivije da postupaju i ne

11 Russia's influence in the Western Balkan https://www.europarl.europa.eu/RegData/etudes/ATAG/2022/733523/EPRS_ATA(2022)733523_EN.pdf

tako javno više pokazuju partnerstvo i želju sa saradnjom sa ruskom stranom, koja je da ponovimo, energetiku koristila kao hibridno sredstvo kojim je ostvarivala uticaj na zemlje regiona. Pogotovo po pitanju Severnog toka 2 na Baltičkom moru[12], moglo se videti koliko je američka strana protiv velikog upliva ruskih energenata u Evropi, pa samim tim i Zapadnom Balkanu, upravo od straha da će postati moćno političko oružje u rukama Kremlja, što se po početku invazije na Ukrajinu moglo i videti u energetskoj krizi, ne tako dramatičnoj kako su mnogi pretpostavljali, koja je usledila.

Ruski cilj, što je sada očigledno, bio je od početka da se spreči, gde može, približavanje zemalja Zapadnog Balkana Evropskoj uniji i pogotovo NATO paktu. Energenti su tu bili samo jedan od alata hibridnog dejstva, koji se koristio u te svrhe. U mnogim zemljama to nije uspelo, kao što su Bugarska, Rumunija, Crna Gora, Severna Makedonija, Albanija, Hrvatska, ali u nekima, kao što su Srbija i Bosna i Hercegovina, zbog političkih problema ove dve države, hibridni metodi su bili vrlo uspešni.

U zemljama u kojima je politička situacija bila nedvosmisleno prozapadna, korišćeni su upravo pomenuti hibridni metodi, kroz uzgajanje zavisnosti od ruskih energenata kako bi se usporile integracije, odnosno finansirali preko tih kompanija oni koji su protiv približavanja tih zemalja Zapadnog Balkana zapadnom svetu.

Međutim, invazija koju je Vladimir Putin izveo protiv Ukrajine, poprilično je smanjila prednost koju je Rusija imala u tim zemljama, pogotovo energetskom sektoru[13]. Ruski cilj je oduvek bio, da hibridnim, odnosno asimetričnim i jeftinim pristupom, uspore balkansku integraciju u institucije Zapada, nešto što im je godinama sa dosta uspeha išlo na ruku[14]. Kroz širenje uticaja i takozvane meke moći na različite načine, podrškom udruženjima simpatetičnim ruskim interesima, sporskim klubovima, školama, medijima, veteranskim grupama, to je sve uz energetski stisak, povećavalo rusku moć u državama Balkana i držalo u neizvesnosti. A mnoge još i danas drže u neizvesnosti i stanju konstantne političke tenzije i podela u društvu.

Pokušaji da se balkanske nacije podele po nacionalnim ili verskim pitanjima, uspore u reformama, sa stanovišta hibridnog ratovanja jeste dobar

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12 Between the Baltic and the Balkans, the new geopolitics of gas, Gilles Lepesant https://www.robert-schuman.eu/en/european-issues/775-between-the-baltic-and-the-balkans-the-new-geopolitics-of-gas

13 Russia's Influence in the Balkans, James McBride https://www.cfr.org/backgrounder/russias-influence-balkans

14 Russia's Influence in the Balkans, James McBride https://www.cfr.org/backgrounder/russias-influence-balkans

model, ali na kraju krajeva može samo da odloži ono što je neminovno, a to je ulazak celog regiona u Zapadni svet. A do čega će doći posle rata u Ukrajini i u skladu sa Evropskom politikom, oslobađanja ruskog energetskog pritiska i zavisnosti. Politika koju će htele ili ne, sve zemlje Balkana morati da slede.

Rat u Ukrajini naterao je sve u Evropi, pa samim tim i zemlje Balkana, da diversifikuju svoje izvore energije, kako i one ne bi u jednom trenutku bili žrtve "energetske ucene", kao jednog od mnogobrojnih hibridnih metoda uticaja na druge zemlje.

Skidanje sa ruskih energenata

Sve to, kao što je pomenuto, promenilo se 24. februara 2022. godine, kada su ruske trupe izvele otvorenu invaziju na Ukrajinu. Vreme gasne ljubavi između Evrope i Rusije je okončano, a samim tim i dobrim delom na Balkanu.

Na primeru Nemačke i njenih problema sa gasom po otpočinjanju rata i sankcija na uvoz ruskih energenata i zemlje Balkana uvidele su koliko je opasno biti toliko "navučen" i zavistan u energetskom sektoru odstrane druge države. Pogotovo mnogo veće sile, kao što je Rusija, koja je upravo energetiku koristila kao jedno od hibridnih sredstava da uveća svoju moć i iskoristi kao prednost, a neki bi rekli i kao ucenu u razgovorima sa Zapadnim zemljama.

Gotovo sve zemlje Balkana pridružile su se sankcijama EU i SAD prema Rusiji, osim Srbije. Većina građana Srbije, kao i vlast, želeli su da "ostanu neutralni" odnosno da ne pokvare odnose sa Ruskom federacijom, te sankcijama se nikada nisu proidružili. Međutim, u energetskom sektoru, koje je ključno za nezavisnost svake države, stvari su počele polako da se menjaju.

Zemlje Balkana počele su da diversifikuju svoja snabdevanja gasom. Srbija je obezbedila da deo potreba za gasom bude obezbeđena iz Azerbejdžana, preko gasnog interkonektora iz Bugarske. Takođe, deo gasa će u budućnosti teći i iz luke Aleksandropolis u Grčkoj, koja je postala regionalni hab za tečni gas (LNG).

Bosna i Hercegovina je u međuvremenu obezbedila fizičku vezu sa LNG terminalom na hrvatskom ostrvu Krk, kako bi diversifikovala svoja snabdevanja.

Grčka je dramatično smanjila kupovinu ruskog gasa, ali još uvek nedovoljno. Bugarska je prekinula ugovor sa ruskim Gaspromom o dopremanju gasa aprila 2022. godine, ali preko alternativnih gasovoda, on i dalje stiže u ovu zemlju. U Bugarskoj rafinerija Neftočkim, koju vodi ruski Lukoil nastavila je da se oslanja na rusku naftu, zahvaljujući izuzetku od sankcija koje je Bugarska obezbedila, ali je pitanje koliko će to trajati, te postaje veliko političko pitanje i u Sofiji i u Briselu.

U planu je da ubrzo bude operativan Jonsko-jadranski gasovod, kojim bi se prirodni gas preko Albanije, Crne Gore, BiH dopremao do Hrvatske. To je sve deo šireg plana da se jugoistočna Evropa, odnosno Balkan, "skinu" sa ruskih energenata, čime bi i politička pritiskak koji Rusija ima nad ovim zemljama bio dramatično umanjen.

Jedna od glavnih alternative je Južni koridor, koji se sastoji od Južnokavkaskog gasovoda koji ide preko Azerbejdžana i Gruzije, koji bi se potom konektovao na Transanadolski gasovod preko Turske, a on nadovezao na Transjadranski gasovod preko Grčke i Albanije, a potom ispod Jadranskog mora ka Italiji[15]. Interkonektor Grčka-Bugarska će gas iz TANAP-a na grčko-turskoj granici dalje povezivati sa Bugarskom, koji će potom preko interkonektora biti povezan sa Srbijom. Sve su to načini na koji se uz pomoć Brisela, balkanske zemlje organizuju i prestaju da budu zavisne isključivo od ruskog gasa.

Možda i najjače energetsko uporište Rusije na Balkanu ostaje sporno vlasništvo nad srpskim NIS-om, ali po uvođenju američkih sankcija na poslovanje NIS, dok ruski kapital ne izađe iz njega, ostaje veliko pitanje koje će biti rešenje za ovog praktično monopolistu u Srbiji. Da li će se naći neko zaobilazno rešenje, preko lažnih kompanija, da bi stvarno NIS ostao i dalje ruski, ili će ga srpska vlada otkupiti, odnosno nacionalizovati, jedno je od gorućih političkih pitanja u Srbiji. Ali, ukoliko Rusi izađu iz NIS, njihovog praktično glavnog uporišta, ne samo u Srbiji, već i Balkanu, oduzeće im poslednju stvarnu prednost koju imaju u regionu i mogu da koriste kao hibridno sredstvo. Nikada nije objavljeno, ali će možda biti, kome je tokom godina NIS donirao novac, koga je sve finansirao od javnih ličnosti i organizacija, te kako je koristeći novac ove kompanije Rusija širila svoj uticaj u Srbiji, ali što se može reći i za sve ruske kompanije na Balkanu i Evropi.

Hibridni rat je "long game", igra se na duge staze. Sredstva koja se koriste su raznovrstna i mogu biti sva ona koja neće dovesti do otvorenog ratnog sukoba. Kada i dođe do ratnog sukoba, to je znak da se elita te zemlje i odlučila za ratni sukob. Energetika jeste jedno od najmoćnijih hibridnih sredstava koje se mogu koristiti, a Rusiji je davala toliko prednosti tokom godina. Kockice su bile fenomenalno raspoređene, ali neuspešna ruska invazija na Ukrajinu, odnosno činjenica da nisu mogli da je zauzmu i postave svoju vlast, sve te godine napora i planova na Balkanu i Evropi, razbila su se u paramparčad. I tako će ostati dug period ispred nas.

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15 Western Balkans must pursue more competitive energy sectors, By Matthew Bryza https://www.atlanticcouncil.org/in-depth-research-reports/issue-brief/western-balkans-must-pursue-more-competitive-energy-sectors/

Energetska suverenost Srbije

Autor: mr Saša Đogović , ekonomista,
urednik Makroekonomskih trendova

1. Elektroenergetski bilans

Elektroenergetski bilans Srbije ukazuje da je Srbija u periodu od 2019 – 2023. godine imala trend rasta u proizvodnji električne energije. Izuzetak je jedino bila 2022. godina. Pad u njenoj proizvodnji u toj godini bio je posledica velike havarije u Rudarskom basenu "Kolubara". Usled te havarije osetno je pala proizvodnja električne energije i skokovito porasla potreba za uvozom uglja. Tako je u 2022. godini proizvedeno oko 35,5 hiljada GWh električne energije, ili za čak 7,1% manje nego godinu dana ranije. Sa pojačanim uvozom uglja u 2023. godini beleži se osetniji pomak napred u dinamici proizvodnje električne struje po stopi od čak 12,7% na godišnjem nivou. Svakako, ovako visoka stopa rasta posledica je i izuzetno niske baze za poredjenje iz 2022. godine.

Proizvodnja električne energije i uglja

	Električna energija ukupno, GWh	Sub-bitumenozni ugalj, mrki ugalj i lignit, t
2019	37600.025	38880520
2020	37956.473	39673059
2021	38235.523	36417513
2022	35510.460	35129689
2023	40027.810	31937750

Izvor: Podaci RZS

Inače, sama proizvodnja uglja od 2020. godine konstantno je u padu. U 2020. godini ona je bila u piku od skoro 39,7 miliona tona, da bi u godinama posle vidljivije opadala, dostigavši oko 31,9 miliona tona u 2023. godini. Procena je da je u 2024. godini proizvodnja dodatno skliznula na oko 31,2 miliona

tona. To znači da je Srbija u periodima posle havarije, morala da povećava uvoz uglja, kako bi obezbedila redovnu proizvodnju električne energije.

To je posledica neprofesionalnog partitokratskog rukovodjenja Elektroprivredom Srbije (EPS). Negativna selekcija kadrova, koja je promovisala partikularne, a ne opšte interese, uzrokovala je amaterizam u kormilarenju celom sistemu EPS-a i time nanela velike štete elektroenergetskom sistemu zemlje i celoj Srbiji, posebno u uslovima visokih berzanskih cena struje tokom prve godine ruske invazije na Ukrajinu. Umesto da profitira, EPS je gubio, a sa njim i cela država kroz krvarenje njenih finansija za potrebe uvoza struje. Tako je u 2022. godini EPS ostvario gubitak u poslovanju od oko 628 miliona evra ili za skoro 400% više nego godinu dana ranije.

Posle enormnog rasta uvoza u godini havarije i visokih berzanskih cena električne struje u 2022. godini (prva godina ruske invazije na Ukrajinu), od čak skoro 1,6 milijardi evra, u 2023. i 2024. godini, kako zbog nižih uvoznih cena, tako i usled povećanog uvoza uglja u kontinuitetu, smanjena je potreba za uvozom u odnosu na vanrednu situaciju iz 2022. godine. Tako je uvoz struje u 2023. godini bio oko 783 miliona evra, a u 2024. godini blizu 651 milion evra. Medjutim, taj iznos uvoza je i dalje daleko veći u odnosu na stanje iz 2019. (238,7 miliona evra) i 2020. godine (168,8 miliona evra).

Izvoz i uvoz električne energije
-u hilj. evra-

	Izvoz	Uvoz	Indeks - izvoz	Indeks - uvoz
UKUPNO	682.518	650.685	53,6	83,1
Albanija	1.148	384	159,6	103,4
Austrija	3.504	-	264,5	-
Bosna i Hercegovina	34.820	154.645	40,4	101,2
Bugarska	75.181	25.101	151,2	43,3
Švajcarska	-	12.871	-	270,4
Danska	-	65.235	-	109,5
Hrvatska	64.101	98.519	55,7	193,2
Madjarska	89.686	79.378	40,8	107,2
Luksemburg	10.340	7.809	72,0	68,3
Crna Gora	97.970	33.337	74,0	66,4
Severna Makedonija	118.868	54.218	85,2	68,9
Holandija	-	12.157	-	783,0
Poljska	-	7.099	-	-
Rumunija	186.900	91.510	37,5	42,4
Slovenija	-	8.420	-	33,6

Izvor: Podaci RZS

U 2024. godini najviše struje uvezeno je sa tržišta Bosne i Hercegovine, 154,6 miliona evra, a potom iz Hrvatske 98,5 miliona evra i Rumunije 91,5 miliona evra. I pored toga što su potrebe za električnom energijom u medjuvremenu porasle sa dinamiziranjem privrednih aktivnosti, ipak, osetno viši nivo uvoza u 2024. godini u odnosu na stanje od pre samo četiri godine, jasno signalizra na nedostatak investicija u energetskom sektoru i nesaniranosti štete s kraja 2021. i početka 2022. godine u Kolubarskom basenu. U 2024. godini značajno je opao i izvoz električne energije sa blizu 1,3 milijarde evra u 2023. na tek 682,5 miliona evra. To je posledica loših hidroloških prilika i nedovoljno novih energetskih kapaciteta. Najveća izvozna tržišta u 2024. godini za Srbiju bila su Rumunija (186,9 miliona evra) i Severna Makedonija (118,9 miliona evra). Koliko je elektroprivredni sistem Srbije u 2022. godini bio havarisan, posebno se vidi preko eruptivnog skoka uvoza mrkog uglja i lignita u 2022. godini prema stanju iz prethodne godine za skoro 7 puta. Naglašena rastuća dinamika uvoza uglja anstavljena je i u 2023. godini, kada je za te potrebe izdvojeno nešto više od 376 miliona evra, odnosno za 132% više nego godinu dana ranije. U 2024. godini se beleži smanjivanje uvoza uglja za 35%, čime je iznos uvoza bio oko 245 miliona evra. No, to je i dalje viši iznos uvoza nego onaj iz pretkrizne 2021. godine.

Uvoz mrkog uglja i lignita u periodu 2021 – 2024. godina
-u hilj. evra-

	2021	**2022**	**2023**	**2024**
Mrki ugalj i lignit	23.280	162.159	376.350	245.115

Izvor: Podaci RZS

Tokom 2023. godine, kada je registrovan najveći uvoz mrkog uglja i lignita, Srbija je ovih sirovina najviše kupovala sa tržišta Indonezije u vrednosti od blizu 159 miliona evra. To je za čak 9,7 puta viši nivo uvoza uglja nego u 2022. godini. Time samo ovaj podatak govori o produženom negativnom delovanju havarije na elektroenergetske bilanse u Srbiji. Na drugom mestu je uvoz iz Bosne i Hercegovine (92,2 miliona evra), a na trećem iz Bugarske (77,6 miliona evra). I iz Bugarske je skokovito porastao uvoz uglja za oko 4 puta prema stanju iz 2022. godine.

Izvoz i uvoz mrkog uglja i lignita po zemljama u 2024. godini
-u hilj. evra-

Naziv	Izvoz	Uvoz	Indeks - izvoz	Indeks - uvoz
UKUPNO	660	245115	150.23	65.13
Bosna i Hercegovina	635	89366	387.07	96.92
Češka	-	9753	-	82.49
Grčka	-	0	-	-
Hrvatska	-	3	-	-
Mađarska	25	-	-	-
Indonezija	-	119971	-	75.49
Indija	-	0	-	-
Crna Gora	-	14204	-	99.87
Severna Makedonija	-	10	-	0.23
Rumunija	-	7035	-	47.03
Turska	-	4772	-	274.74

Izvor: Podaci RZS

I u 2024. godini prva dva mesta dominantno pripadaju tržištima Indonezije i Bosne i Hercegovine, dok iz Bugarske nije evidentiran uvoz.

Iako još uvek nema podataka o proizvodnji električne struje u 2024. godini, polazeći od izuzetno sušnog leta i potrebe za uvozom električne energije u tom periodu, uz dalji pad proizvodnje uglje, može se izvući zaključak da je ukupna proizvodnja električne energije u 2024. godini bila u osetnijem padu. Na to signaliziraju i podaci da je profit EPS-a pao sa 958 miliona evra u 2023. na samo 200 miliona evra u 2024. godini, ili blizu 5 puta.

Zbog elektroenergetske nesuverenosti, vlada Republike Srbije je ugovorila investiciju izgradnje solarnog parka na jugu Srbije snage 1 gigavata, koja bi trebala da krene sa realizacijom ovog proleća. Za Srbiju bi od značaja bilo i pokretanje investicije u HE Djerdap.

Nesumnjivo je da postojeći elektroenergetski kapaciteti i resursi nisu, niti će u doglednoj budućnosti biti dovoljni da zadovolje potrebe svih potrošača, posebno sa razvojem tehnologije veštačke inteligencije. U poslednje vreme je završena tek jedna veća investicija, a to je blok 3 u TE Kostolac, što je dosta poražavajuće. Dakle, Srbija već kasni sa strateškim investicijama na sektoru proizvodnje električne energije.

Bilans električne energije u 2023. godini

	Solarna foto-naponska energija	Energija vetra	Hidro-energija	Električna energija (ukupno)
	GWh			
Primarna proizvodnja energije	46.565	1067.942	13080.477	–
Uvoz	–	–	–	5174.188
Izvoz	–	–	–	7363.937
Saldo zaliha	–	–	–	–
Ukupno raspoloživa energija	**46.565**	**1067.942**	**13080.477**	**-2189.749**
Skladišta za međunarodni brodski saobraćaj	–	–	–	–
Ukupna domaća potrošnja	**46.565**	**1067.942**	**13080.477**	**-2189.749**
Međunarodni avio prevoz	–	–	–	–
Ukupno snabdevanje energijom	**46.565**	**1067.942**	**13080.477**	**-2189.749**
Utrošak za proizvodnju energije	**46.565**	**1067.942**	**13080.477**	**970.913**
Hidroelektrane	–	–	13080.477	–
Vetroelektrane	–	1067.942	–	–
Solarne elektrane	46.565	–	–	–
Reverzibilne hidroelektrane	–	–	–	970.913
Proizvodnja energije transformacijom	**-**	**-**	**-**	**40027.776**
Hidroelektrane	–	–	–	13080.477
Vetroelektrane	–	–	–	1067.942
Solarne elektrane	–	–	–	46.565
Termoelektrane	–	–	–	23501.801
Termoelektrane - toplane (TE-TO)	–	–	–	1849.677
Energane	–	–	–	481.314
Sopstvena potrošnja u energetskom sektoru1)	**-**	**-**	**-**	**4004.546**
Hidroelektrane	–	–	–	94.303
Termoelektrane	–	–	–	2415.310
Termoelektrane - toplane (TE-TO)	–	–	–	104.846
Energane	–	–	–	37.077
Toplane	–	–	–	172.940
Ekstrakcija nafte i gasa	–	–	–	89.758
Rafinerije	–	–	–	325.533
Petrohemija	–	–	–	–
Visoka peć	–	–	–	–
Rudnici uglja	–	–	–	642.678
Prerada uglja	–	–	–	33.160
Ostali	–	–	–	88.941

Gubici	**-**	**-**	**-**	**4129.461**
Energija raspoloživo za finalnu potrošnju	**-**	**-**	**-**	**28733.107**
Finalna potrošnja za neenergetske svrhe	**-**	**-**	**-**	**-**
Od toga za hemijsku industriju	-	-	-	-
Finalna potrošnje za energetske svrhe	**-**	**-**	**-**	**28733.107**
Industrija2)	-	-	-	9274.111
Gradjevinarstvo	-	-	-	353.826
Saobraćaj	-	-	-	394.109
Domaćinstva	-	-	-	13008.212
Poljoprivreda	-	-	-	367.307
Otsali potrošači	-	-	-	5335.542
Statistička razlika	**-**	**-**	**-**	**-**

1) Uključena je i energija koja kruži u sistemu

2) Industrija, osim energetskog sektora i finalne potrošnje u neenergetske svrhe

Izvor: Podaci RZS

2. Energetski bilans prirodnog gasa

Srbija je uvozno zavisna od prirodnog gasa. Prema poslednje raspoloživim podacima zvanične statistike u 2023. godini je ukupna domaća potrošnja bila na nivou od oko 2,8 milijardi Stm3. To je, zbog povoljnijih vremenskih prilika manji nivo potrošnje nego u 2022. godini, kada je iznosio oko 2,9 milijardi Stm3.

Bilans prirodnog gasa u 2023. godini

	Prirodni gas (000 Stm3)
Primarna proizvodnja energije	314934
Uvoz	2657624
Izvoz	-
Saldo zaliha	-141992
Ukupno raspoloživa energija	2830566
Skladišta za medjunarodni brodski saobraćaj	-
Ukupna domaća potrošnja	2830566

Izvor: Podaci RZS

Uvoz prirodnog gasa eruptirao je u 2022. godini. Iznosio je 1,6 milijardi evra. To je bilo za čitavih 282,8% više nego u predratnoj 2021. godini. Tada je iz Ruske federacije kupljeno prirodnog gasa u vrednosti od čak 943 miliona evra, ili za 141,7% više nego prethodne godine. Zanimljivo je da je iz Madjarske povučeno prirodnog gasa u vrednosti od čak 670 miliona evra. Time je indeks veći od 1000 prema stanju iz 2021. godine. Evidentno je da se radi o kupovini madjarskog prirodnog gasa, koji su oni imali u svojim skladištima u toj godini.

Izvoz i uvoz prirodnog gasa
-u hilj. evra-

Godina	Izvoz	Uvoz
2020	496	409.386
2021	1.020	426.953
2022	8.053	1,634.366
2023	1.689	1,258.993
2024	42	993.767

Izvor: Podaci RZS

U 2023. i 2024. godini ukupan uvoz se smanjuje. U poslednjoj posmatranoj godini iznosio je oko 994 miliona evra. No, on je znatno viši pre ruske invazije na Ukrajinu. Naime, u 2021. godini ukupne nabavke prirodnog gasa bile su na koti od 427 miliona evra.

Razloge za znatno višim količinama prirodnog gasa koji se kupuju iz inostranstva u periodu od 2022. godine posledica su, kako stvaranja strateških rezervi, tako i preko nešto viših cena za dodatne isporuke gasa. Uz to, povećava se i sama potrošnja plavog energenta. Ona je u 2020. godini bila na tački od 2,5 milijardi Stm3, da bi na kraju 2023. godine došla do nešto više od 2,8 milijardi standardnih metara kubnih. No, to u velikoj meri zavisi od dužine i oštrine zimskih prilika.

Tradicionalno, Srbija najviše prirodnog gasa uvozi sa ruskog tržišta. Tako je u 2024. godini sa ovog tržita nabavljeno plavog energenta u iznosu od skoro 774 miliona evra. To je činilo čak 77,9% ukupnih nabavki gasa sa ino tržišta. Iz Madjarske je nabavljeno količina gasa u vrednosti od blizu 185 miliona evra. To je rezultat ranije uskladištenog prirodnog gasa sa ruskog tržišta u skladišnim kapacitetima Madjarske.

Izvoz i uvoz prirodnog gasa po zemljama u 2024. godini
-u hilj. evra-

Naziv	Izvoz	Uvoz	Indeks - izvoz	Indeks - uvoz
UKUPNO	42	993.767	2,48	78,9
Azerbejdžan	-	28.614	-	-
Bugarska	-	6.831	-	201,6
Francuska	-	1	-	75,2
Mađarska	-	184.608	-	118,2
Crna Gora	12	-	5,0	-
Severna Makedonija	30	-	2,3	-
Ruska Federacija	-	773.712	-	70,4

Izvor: Podaci RZS

U 2024. godini po prvi put se javlja uvoz prirodnog gasa iz Azerbejdžana u simboličnom iznosu od 28,6 miliona evra. Kako je od samog starta 2024. godine u funkciji interkonekcija sa Bugarskom, to je realno očekivati da će rasti vrednost uvoza prirodnog gasa sa azerbejdžanskog tržišta.Već ranije je ugovorena količina do 400 miliona kubika do 2026. godine.

U cilju dodatne ozbiljnije diversifikacije gasnog tržišta, strateški cilj Srbije treba da bude izgradnja gasne interkonekcije sa Rumunijom. Time bi se osetno redukovao energetski, odnosno preko energetike i politički uticaj Ruske federacije na Srbiju. Drugim rečima, Srbija bi dobila više na suverenosti prilikom donošenja političkih odluka od njenog strateškog interesa.

Jedan od modaliteta diversifikacije izvora nabavki prirodnog gasa jeste i tečni ili ukapljeni prirodni gas. On jeste skuplji, ali može da bude dobar pobočni faktor u energetskoj diversifikaciji, posebno kod geostrateškog pozicioniranja. U 2024. godini Srbija je uvezla tečnog prirodnog gasa u vrednosti od minornih 450 hiljada evra, dominantno sa tržišta SAD-a u iznosu od 380 hiljada evra.

2. Energetski bilans nafte

Kako delom kod električne energije, tako dominantno kod prirodnog gasa, te i nafte Srbija je uvozno zavisna zemlja.

Bilans nafte za 2023. godinu, što su poslednji raspoloživi statistički podaci, ukazuju da je u strukturi ukupne potrošnje nafte, čak 78,8% došlo direktno iz uvoza.

Bilans nafte u 2023. godini

	Sirova nafta (t)
Primarna proizvodnja energije	805872
Uvoz	3053285
Izvoz	-
Saldo zaliha	17511
Ukupno raspoloživa energija	387668
Skladišta za medjunarodni brodski saobraćaj	-
Ukupna domaća potrošnja	3876668

Izvor: Podaci RZS

U periodu 2020 – 2024. godine najviše nafte je uvezeno u godini početka ruske agresije na Ukrajinu, blizu 2,2 milijarde evra.To je bilo za čak 91,1% više nego u 2021. godini. Osnovni generator ovako rapidnog rasta uvoza, pored više cene, jeste i potreba da se kreiraju strateške rezerve u turbulentnim geopolitičkim okolnostima.

Uvoz nafte i ulja od bituminoznih minerala
-u hilj. evra-

Godina	Uvoz
2020	732.815
2021	1,138.783
2022	2,175.802
2023	1,791.770
2024	1,494.690

Izvor: Podaci RZS

U 2023. i 2024. godini dolazi do smanjivanja vrednosti uvoza nafte na 1,8 milijardi evra, odnosno 1,5 milijardi evra. To je posledica spuštanja cene nafte na svetskom tržištu, ali i prenesenih zaliha, pa su bile potrebne manje količine za nabavku.

Izvoz i uvoz nafte i bituminoznih ulja po zemljama u 2024. godini
-u hilj. evra-

Naziv	Uvoz	Indeks - uvoz
UKUPNO	1,494.690	83,4
Azerbejdžan	390.584	617,5
Mađarska	1.629	*
Irak	567.490	71,8
Kazahstan	476.965	151,1
Libija	53.078	39,0
Rumunija	4.499	65,7

Izvor: Podaci RZS

Kako su u poslednjem mesecu 2022. godine stupile na snagu sankcije na uvoz nafte iz Ruske federacije, to je uvoz ovog energenta iz ove zemlje u 2023. godini bio simboličan, tek 203 hiljade evra. Primera radi, u celoj 2022. godini taj uvoz sa ruskog tržišta iznosio je oko 1 milijarde evra i bio je za čak oko 3,5 puta viši nego u 2021. godini.U predratnim 2020. i 2021. godini Srbija je nafte najviše uvozila iz Iraka, a potom sa ruskog tržišta.

U 2024. godini sa punom primenom sankcija na uvoz nafte iz Ruske federacije, ova zemlja se više ne pojavljuje ka srpski dobavljač ovog energenta. Opet na prvo mesto izbija Irak koji je Srbiji prodao nafte u vrednosti od oko 567 miliona evra, a zatim sledi Kazahstan sa 477 miliona evra. Na trećem mestu je Azerbejdžan sa čijeg tržišta je Srbija nabavila nafte u iznosu od 391 milion evra, ili za oko 6,1 puta više nego u 2023. godini. To je upravo posledica sankcija prema ruskom tržištu. Moguće je da iza nekih od ovih zemalja zaista i stoji ruska nafta.

Aktuelna vlast u Srbiji ima u planu da, pored postojećeg naftovoda JANAF, sagradjenog u bivšoj Jugoslaviji, a koji polazi iz Hrvatske, krene u konkretnu investiciji na naftovodu koji bi Srbiju preko Madjarske povezao sa Ruskom federacijom. Otvoreno je pitanje da li će zaista doći do realizacije ovog projekta u procesu novog geostrateškog preslagivanja i oštre društveno-političke krize u samoj Srbiji, koja trese temelje i same vlasti.

Takodje, otvoreno je i pitanje sudbine Naftne industrije Srbije (NIS), koja je u većinskom vlasništvu ruskog partnera. Ta kompanija se nalazi pod udarom američkih sankcija, koje su omekšane davanjem posebne licence za rad do 28. marta ove godine. Postoji mogućnost da se taj rok dalje produžava, jer ruska strana za sada nema nameru da u potpunosti

napusti svoje pozicije u NIS-u, a koje joj više služe za infiltriranje svojih propagandnih narativa u samoj Srbiji, ali i u regionu Zapadnog Balkana. Istovremeno, srpska vlast ne želi direktnu konfrontaciju sa zvaničnim Kremljom i ne poseže zaštiti svojih vitalnih nacionalnih interesa preko nacionalizacije NIS-a. Za sada je rešenje problema odloženo preko fleksibilnost američke strane, što je plod lobiranja kod nove Trampove administracije.

4. Otpad, neiskorišćen privredni i energetski resurs Srbije

U ovom poglavlju fokusiraćemo se na životnu sredinu i potencijale zelene ekonomije u Srbiji, kao potentan rezervoar za podizanje vrednosti bruto domaćeg proizvoda zemlje.

Prošlo je već više od tri godine otkad je Srbija otvorila klaster 4 u okviru pregovora o pridruživanju Evropskoj uniji, koji se odnosi na transportnu politiku, energetiku, transevropske mreže i životnu sredinu. To je razlog da vidimo gde se Srbija nalazi u domenu zaštite životne sredine i zelene ekonomije. Poslednji zvanični statistički podaci odnose se na 2023. godinu.

Prema tim podacima, Srbija je proizvela 180,2 miliona tona otpada. To je za 3,2% više nego u 2022. godini. U odnosu na stanje iz 2021. godine, radi se o povećanju stvorenog otpada za čak 2,6 puta. Ovaj podatak ukazuje da je u proteklom periodu došlo do investicija u one privredne grane koje se mogu nazvati zagadjivačima. To je, svakako, rudarstvo. Masivne investicije kineskog Zidjina u Borskom basenu glavni su okidač drastičnog uvećanja otpada na srpskom tržištu. To potvrdjuje podatak da je u 2023. godini rudarstvo izbacilo skoro 171 milion tona otpada, ili za 3,7% više nego u 2022. godini, odnosno za čak skoro 2,9 puta više nego u 2021. godini. U strukturi stvorenog otpada, onaj iz rudarstva je u 2023. godini činio čitavih 94,9%. U 2021. godini taj udeo je bio 84,9%. Od ukupno kreiranog, 22% otpada spada u kategoriju opasnog. U 2022. godini opasnog otpada je bilo u celini 17,1%. Dakle, primetan je rast opasnog otpada koji se izbacuje iz proizvodnih pogona, a primarno iz rudarstva. Samo rudarstvo je u 2023. godini izbacilo 76,9% neopasnog i 23,1% opasnog otpada. U 2022. godini opasnog otpada iz rudarstva bilo je 18%. I ovi podaci za 2022. i 2023. godinu ukazuje da je primetan osetan rast novog opasnog otpada iz rudarstva, kao posledica novih investicija i robusnijeg rudarenja.

	2023. godina, tona
Ukupno tretirano	**178,855.578**
Ponovo iskorišćeno	***2,209.184***
Korišćenje otpada kao goriva za proizvodnju energije	***211.181***
Reciklirano	1,824.100
Otpad za zatrpavanje/nasipanje	173.903
Odloženo	***176,646.393***
Odlaganje na tlo	176,411.233
Ostali načini odlaganja	235.160

Izvor: Podaci RZS

U 2023. godini je od ukupno 180,2 milina stvorenog otpada tretirano 178,9 miliona tona. Na prvi pogled to je veoma dobar rezultat. Medjutim, ako se ide dublje u analizu, onda podatak da se od 178,9 miliona tretiranog otpada, čak 176,4 miliona tona samo odlaže na tlo predstavlja poražavajući podatak. Pri tome se na tlo odlaže i 22,4% opasnog otpada. Uz to i 77,6% neopasnog otpada stoji neiskorišćeno.

Dakle, ovi podaci frapantno signaliziraju preku potrebu za investicijama u ekološke projekte, odnosno razvoj cirkularne ekonomije. Ona posebno može doći do izražaja u oblasti energetike, ali i reciklaže, u gradjevinarstvu, itd.

Primera radi, pepeo, koji proizvede Elektroprivreda Srbije može da se koristi u gradjevinskoj industriji. A godišnje se izbaci oko 7 miliona tona pepela, za čije održavanje se troše velika sredstva, umesto da pepeo bude izvor nove zarade. Samo 5% pepela se proda, dok je ostatak na deponijama.

Od svega 2,2 miliona tona tretiranog otpada, koji je ponovo iskorišćen, najviše je otišlo na reciklažu, oko 1,8 miliona tona. Udeo tretiranog otpada sa 211 hiljada tona, kao goriva za proizvodnju energije je 9,6%. To je, ipak, iskorak, ali nedovoljan, prema stanju iz 2022. godine kada je bio na koti od tek 4,2%.

I podaci o prečišćenim vodama znakovito ukazuju na potrebu za značajnim ulaganjima i u ovom domenu zaštite životne sredine. Tako je od 101 miliona m3 otadnih voda koje kreira industrija, svega 31 milion m3 prečišćeno u 2023. godini.

Svi navedeni podaci jasno signaliziraju da postoje veoma veliki resursi za razvoj cirkularne ekonomije i zelene energije. U tom smislu neophodni su i konkretni projekti koji će ići u pravcu realizacije zelene agende, a posebno iz domena energetike.

5. Planirani energetski projekti

U domenu razvoja naftne i gasne infrastrutkure izdvajaju se sledeće strateške investicije:

- Priključenje Srbije na naftovod Družba, preko Madjarske. Time bi se otvorila vrata za direktan dotok i kupovinu nafte sa ruskog tržišta. Trenutno je uvoz crnog zlata iz Ruske federacije pod sankcijama Evropske komisije, pa Srbija preko Hrvatske, odakle kreće naftovod još iz doba nekadašnje Jugoslavije, nije u mogućnosti da isti uveze. Umesto ruskog, preko tog naftovoda dominantno teče iračka nafta.

Završena je studija izvodljivosti za ovaj projekat. Ona obuhvata deonicu u Madjarskoj od 180 km i Srbiji 120 km. Plan je da se projekat realizuje 2027. godina. Vrednost madjarske deonice naftovoda je 320 miliona evra, a srpske 157 miliona evra. Njegov kapacitet je 5,5 miliona tona nafte. Cilj realizacije navedenog projekta je diversifikacija izvora snabdevanja i transporta nafte. Ovaj naftovod bi stvorio prostor i za dotok kazahstanske, a ne samo ruske nafte. U ekonomskom smislu, projekat bi omogućio Srbiji povoljnije uslove snabdevanja naftom. No, ostaje pitanje koliko se ovim projektom izlazi u susret i interesima samog Kremlja. Evidentno je da vlasti u Srbiji percipiraju da bi do završetka izgradnje naftovoda moglo doći i do političkog rešenja za Ukrajinu, a samim time i ukidanja, ako ne svih, bar većeg dela sankcija ka Ruskoj federaciji, čime bi taj naftovod imao svoje i političko i ekonomsko utemeljenje. U suprotnom, teško je opravdati potez da se u manje-više neizmenjenim geopolitičkim okolnostima, Srbija odluči da uvozi naftu iz Ruske federacije preko Madjarske, iako ima opciju da to radi sa Irakom preko Hrvatske. Kako će teći realizacija ovog projekta umnogome će zavisiti od rešavanja slučaja NIS, odnosno modaliteta normalnog funkcionisanja ove energetske kompanije, koja je trenutno pod ruskom šapom. Stoga je pitanje ovog projekta više političko i geopolitičko, nego ekonomsko pitanje.

Realizacija ovog projekta je sasvim izvesno u punom interesu Ruske federacije, jer zvanični Kremlj nastoji da, posle gasne diversifikacije Srbije, preko izgradnje interkonektora sa Bugarskom, a u planu su i povezovanje sa Grčkom preko Severne Makedonije i sa Rumunijom, donekle zadrži svoju energetsku poziciju u Srbiji. Samim tim, preko energetike cilj je da očuva svoj politički uticaj na području Srbije i preko Srbije, većeg dela Zapadnog Balkana. Na taj način Srbija i Zapadni Balkan postaju objekti na meniju pregovaranja velikih sila, odnosno SAD-a i Ruske federacije. Ta pozicija zvaničnom Kremlju se trenutno narušava. S jedne strane, zaustavljen je

uvoz nafte sa ruskog tržišta, pri čemu Srbija ima alternativna tržišta koja funkcionišu, a s druge strane, izgradnjom bugarskog interkonektora već od jeseni 2024. godine stvoreni su uslovi da se smanji potreba za uvozom plavog energenta sa ruskog tržišta. Taj gasovod iz Azerbejdžana preko Bugarske je kapaciteta 1,8 milijardi kubika godišnje. Za sada je u 2024. godini ugovorena količina gasa od 400 miliona kubnih metara koji će se nabaviti iz Azerbejdžana, uz opciju da se te isporuke povećaju.

- Vlade Srbije i Severne Makedonije potpisale se Memorandum o izgradnji zajedničkog gasovoda dužine 70 km, kapaciteta 1,2 milijarde metara kubnih. Time bi Srbija bila još bliže povezana sa Grčkom, odnosno sa lukom Aleksandropulos, odakle bi ukapljeni gas polazio. Ministarstvo saobraćaja, gradjevinarstva i infrastrukture stavilo je na javni uvid Prostorni plan posebne namene sa elementima detaljne regulacije za magistralni gasovod MG14 Orljane – Leskovac – Vranje – granica sa Severnom Makedonijom. Za realizaciju ovog projekta računa se na finansijsku podršku Evropske unije, jer se radi o regionalnom projektu u cilju dalje diversifikacije izvora snabdevanja energentima.

- Pored već izgradjene i puštene u rad gasne interkonekcije sa Bugarskom, koja povezuje Srbiju sa Azerbejdžanom, Srbija ozbiljno ulazi i u opciju izgradnje gasne interkonekcije sa Rumunijom kapaciteta 1,6 milijardi kubnih metara.

Trenutno, nacionalni gasni transportni sistemi Srbije i Rumunije nisu povezani. No, kako Rumunija pretenduje da bude regionalni lider i jedan od glavnih proizvodjača prirodnog gasa u Evropi do 2028. godine, to je nesumnjivo interes i same Evropske unije, kao i Srbije da se uspostavi praktična saradnja sa rumunskom stranom u cilju dalje diversifikacije izvora snabdevanja gasom, ali i zarad daljeg transporta plavog energenta ka EU. U toku je realizacija velikog projekta pod nazivom „Neptun dip“, vezano za eksploataciju prirodnog gasa iz Crnog mora u Rumuniji, što je upravo odskočna daska za jasnije pozicioniranje Rumunije na energetskoj mapi regije i Evrope, a samim time i šansa za Srbiju da jeftinije dodje do plavog energenta.

Ta gasna interkonekcija izmedju Srbije i Rumunije radila bi se na lokaciji Mokrin – Arad. Dužina gasovoda kojim bi se dve zemlje povezale bila bi 85,5 km sa rumunske strane, odnosno svega 12,8 km sa srpske strane. Dakle, Srbije bi sa malo novih ulaganja mogla da dodje do novog snabdevača gasom, bez posrednika u transportu. Sa srpske strane radovi bi trebalo da budu okončani do 2027. godine. Procenjuje se da će Srbiju ovaj gasovod koštati

12 miliona evra. Rumunski Transgaz procenjuje da bi tenderska procedura za početak radova u Rumuniji mogla da počne u 2026. godini, a da se radovi završe do 2028. godine. Prvi korak je već učinjen. Potpisan je Memorandum o razumevanju izmedju resornih ministarstava vlada Srbije i Rumunije u avgustu ove godine. Da zaključimo, sa već izgradjenim interkonektorom prema Bugarskoj, te započetim radnjama na realizaciji planova za gradnju interkonekcije prema Severnoj Makedoniji i Rumuniji, Srbija će definitivno obezbediti punu diversifikaciju izvora snabdevanja plavim energentom. Samim time, biće važno čvorište za snabdevanje jednog dela zemalja EU, dok će, s druge strane, biti izbačen ruski uticaj preko gasa kao poluge u političkom ucenjivanju i manipulisanju političkim prilikama u Srbiji.

Od elektroenergetskih projekata koji su planu izdvojićemo sledeće:

1. Predstavnici Vlade Srbije, Elektroprivrede Srbije (EPS) i konzorcijuma kompanija Hyundai Engineering i UGT Renewables polovinom oktobra 2024. godine potpisali su Ugovor o realizaciji projekta za izgradnju solarnih elektrana na teritoriji šest lokalnih samouprava u Srbiji (teritorije gradova Zaječara i Leskovca, te Negotin, Bujanovac, Lebane i Odžak). Reč je o Projektu izgradnje bez upravljanja i održavanja samobalansiranih solarnih elektrana velikog kapaciteta, ukupne instalisane snage od najmanje 1.000 megavata sa baterijskim sistemima za skladištenje električne energije ukupne instalisane snage od najviše 200 megavata i kapaciteta da uskladišti najmanje 400 megavatsati struje. Trenutno se radi na planskoj i tehničkoj dokumentaciji, dok se početak radova očekuje početkom 2026. godine.

2. Razvoj projekta izgradnje reverzibilne hidroelektrane Bistrica. U toku je procena projektne i tehničke dokumentacije koju radi japanska agencija za medjunarodnu saradnju (JICA). Plan države je da pripremni radovi budu pokrenuti tokom 2026. godine.

3. Sa francuskim partnerima pokrenuta je i priča o izgradnji kapaciteta nukelarne energije. Trenutno su održane dve radionice o izgradnji ljudskih kapaciteta za potrebe razvoja nuklearne energije i načina uključivanja srpske industrije u taj projekat. Plan je da francuski partneri EDF i Egis u aprilu predstave rešenja koja bi bila primenjiva za Srbiju, odnosno tehnologije koje bi bile ponudjene za razvoj nukelarne energije. Opcije su male modularne elektrane ili velika nuklearna elektrana.

4. Završena je prva faza revitalizacije reverzibilne HE Bajina Bašta. Tokom marta bi trebalo da su počeli radovi na obnovi i drugog agregata. Revitalizacija reverzibilne HE Bajina Bašta donosi dodatnu sigurnost srpskom elektroenergetskom sistemu, veću pouzdanost i produženje radnog veka

zlatne rezerve u sistemu Elektroprivrede Srbije. Naša jedina reverzibilna HE važna je rezerva tokom perioda povećane potrošnje struje ili prilikom sušnih perioda.

Za Srbiju bi od velikog značaja bila izgradnja HE Djerdap 3. No, taj projekat bi se mogao realizovati tek u trouglu Beograd – Vašington – Bukurešt.

Takodje, postoje planovi na realizaciji investicije HE Buk Bijela. Kamen temeljac je postavljen još u maju 2021. godine i od tada je sve ostalo na tom temeljcu. Vrednost projekta u to vreme je bila oko 250 miliona evra, a na njemu su zajednički trebalo da rade elektroprivrede manjeg entiteta Bosne i Hercegovine (Republika Srpska) i Republika Srbija. Medjutim, zbog nerešenih imovinskih odnosa unutar Bosne i Hercegovine, odnosno dva entiteta u toj zemlji, projekat još uvek stoji. Eventualno uključivanje američke strane u realizaciju ovog projekta moglo bi pomoći u njegovom otključavanju. Interes ovog projekta je interes i Srbije i Bosne i Hercegovine.

Može se zaključiti da Srbija nema punu energetsku suverenost. Za naftu i prirodni gas je to prirodno, jer Srbija ne raspolaže tim energetskim sirovinama, pa je prinudjena da ih uvozi. Na tom polju veoma je važno proaktivno raditi na diversifikaciji izvora snabdevanja.

Problem je što i na elektroenergetskom planu Srbija nema punu suverenost. Da bi se ona obezbedila i time podigla i konkurentska snaga domaće ekonomije, kao baza za razvoj ostalih privrednih kapaciteta, neophodno je kontinuirano raditi na otklanjanju prepreka u razvoju novih investicija u ovom sektoru energetike. Te prepreke mogu biti političke prirode, poput političkih relacija sa Bosnom i Hercegovinom ili pak nepostojanja društvenog konsenzusa unutar samog srpskog društva oko daljih pravaca razvoja energetske infrastrukture u zemlji.

Why does the unresolved status of the oil industry threaten Serbia's national security?

Author: MSc Darko Obradović, consultant, program director of the Center for Strategic Analysis

The last in a series of challenges to Serbia's energy security arose from the imposition of sanctions against the Oil Industry of Serbia (NIS) due to the presence of Russian ownership. The sanctions against NIS were introduced on January 10, 2025. From that moment, Serbia finds itself in a position where it must protect its economy from processes it cannot influence. NIS is just one of 400 contentious entities sanctioned by the U.S. on that date. Importantly, the sanctions are not targeted specifically at Serbia. NIS contributes 7% to Serbia's GDP. Due to Russian ownership, the Serbian economy is at risk, and it is expected that the state will take action to protect its economic, energy, and national security. The threat of sanctions against NIS has been present since February 24, 2022, and is not new. Over the past three years, nothing has been done to eliminate the risk resulting from Russian ownership. In the previous 30 days, an opportunity to address this issue was missed. As early as May 2022, Gazprom faced sanctions, and NIS itself has been under pressure from the EU. The long-term unsustainable position has been further jeopardized by the American sanctions package. In October 2023, a review of the sanctions against NIS began. It is essential to recognize that NIS is an invaluable resource for the Serbian economy and that a solution must be found to reduce the risk of negative consequences due to the sanctions. Official Washington is interested in the long-term stability of Serbia and the Balkans, which is why a deadline was extended at the last moment to prevent a collapse of the Serbian economy. Out of the 400 sanctioned entities on January 10, 2025, no extensions were granted to anyone to adjust to the sanctions. On February 26, 2025, OFAK issued a special license to JANAF and NIS to complete transactions that were concluded before the sanctions took effect. The license has been reissued for the next 30 days and will be valid until April 28, 2025, during which time NIS will be able to operate without interruptions This license does not represent a delay of sanctions, as is often misrepresented in the public, but rather is the time for a

credible plan to change ownership and complete transactions finalized before January 10. Within the specified timeframe, Serbia needs to prepare a feasible plan to submit to OFAK. There are no guarantees that the deadline for submitting the plan will be extended after April 28. During the execution of that plan, NIS will operate normally as long as the plan is implemented. The issue of NIS is no longer just a matter of Russia or the U.S. but rather a matter of decisions that Serbia will make. It is clear that the Russian side does not wish to relinquish control over NIS and will not give up its energy monopoly in Serbia. It is particularly dangerous that lawyers paid by the Russian side are negotiating regarding the status of NIS. The fate of energy security is left in dangerous hands, those of the Russian side, whose interests do not align with those of Serbia. There is a concern that Serbia has, for non-commercial reasons, agreed to have its energy and economic security managed by those paid by the Russian side. Serbia is missing an economic opportunity presented by resolving the Russian ownership issue in NIS. Once the 30-day period expires, or when the sanctions regime begins, NIS will lose value, and the consequences will affect the Serbian economy. The question arises as to why Serbia is not considering nationalization as a last resort. Every state would take measures to protect its national interest by any means necessary to prevent harm. The absence of state action regarding NIS sends a bad message to investors, suggesting that decisions are not made based on commercial interests in economic and energy matters. The Constitution of Serbia provides the possibility for a law on nationalization to be enacted. There is also the argument that nationalizing NIS is not possible because the deal with Gazprom is a result of an intergovernmental agreement. Legal experts and lawyers believe that the intergovernmental agreement is not an obstacle to nationalization. The Energy Law of 2024 can serve as a basis for nationalization through the emergency measures it provides for. The most important thing at this moment is to have a plan for changing ownership that will be submitted to OFAK. There are no guarantees that the deadline for submitting the plan will be extended. The fact is that NIS cannot function normally under sanctions. The consequences relate to payment transactions, business dealings with banks, use of payment cards, procurement of services and products, including fuel and spare parts for the refinery. At this moment, many companies do not want to do business with entities under sanctions. Regarding the potential lifting of sanctions, the final decision lies with the U.S. Congress. This process is lengthy and difficult, and Serbia does not have time to spare. The issue of fuel supply at Belgrade airport is also problematic due to the policies of insurance companies and international carriers. The deadline for action is March 28. There will be no change in the regime of American sanctions; they have just been extended for another year. U.S. Treasury Secretary Janet Yellen has announced even stronger sanctions against Russia. NIS under sanctions can endure for 30 to 60 days, which also applies to the Serbian economy, and there will be no major agreements or

lifting of sanctions in such a short time frame. For reference, NIS requested a delay of 60 to 90 days but was granted only 30 days, and then additional 30 days. The extension of the deadline does not change the sanctions policy but is rather a goodwill gesture to allow time for Serbia to technically resolve the existing problem.

If we continue to analyze the overall situation surrounding Gazprom and NIS, we can see that sooner or later, a conflict will arise in the Belgrade-Moscow relationship, as Serbia is currently in a "hostage" crisis. Over time, citizens will understand the magnitude of the historical mistake of ceding NIS to a Russian partner. The valuation of NIS during its transfer in 2008 is particularly interesting. At that time, the renowned Meri Lynch assessed its value at $2.5 billion, excluding assets that later became the property of Russia for €400 million. From this information, we see that the agreement with the Russians was never a commercial deal. When discussing threats and dangers, it should be noted that the only harm and threat come from Russia and its actions regarding NIS. For example, Germany has nationalized three refineries and continued to do business with Russia. If the Russian partner ignores pressures and demonstrates a lack of a "brotherly" relationship with Serbia, it will, in the long term, destroy the partnership.

Regarding the importance of NIS and Gazprom in the Western Balkans, it cannot be excluded that it serves as a machine of political influence. NIS in Russian hands has, on one hand, generated profit for the Russian side, while on the other, there has probably existed a whole network of influence. There are doubts that the foreign government, Russia, manipulated citizen opinions regarding foreign policy orientation. In this case, we are talking about a loss of informational sovereignty, which has been undermined by Russian informational operations in our public space. Russia's refusal to demonstrate a friendly relationship with Serbia indicates that it seeks to create a geopolitical battlefield from our energy sector. By trying to retain NIS, Russia aims to maintain its energy monopoly and opaque influence in Serbia and the Western Balkans.

By nationalizing NIS, the Serbian government will demonstrate that it cares about the stability of the business environment and will send a positive signal to foreign direct investments. The uncertainty regarding NIS's status reflects on decision-making for investments in Serbia. Sanctions against NIS will not be lifted in the near future; the only likely scenario concerns an extension of the deadline for submitting the ownership change plan.

The impact of energy security on the national security of the republic of Serbia

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Natural Gas supply as national security risk

Until the outbreak of the gas crisis triggered by the full-scale invasion of the Russian Federation towards Ukraine in 2022, there was little discussion about energy security in the Republic of Serbia. Even those who did address the topic emphasized that Serbia was absolutely secure regarding gas supply, due to its friendly relations with Russia, which had been the main supplier of energy resources. However, within the first days of the chaos that arose in the gas supply market, the situation became much clearer, albeit negatively for the citizens of the Republic of Serbia. Specifically, when gas prices began to rise uncontrollably in the market and supply chains were compromised due to unlawful Russian destruction of sovereign Ukraine, a pressing need arose in Serbia to prepare reserves of this energy resource in the sole underground storage facility, Banatski Dvor. However, at that time, the Russian partner Gazprom, which is the majority owner of the Oil Industry of Serbia (NIS) and thus of the mentioned storage facility, refused to supply part of the gas in Banatski Dvor to the authorities in Serbia and, consequently, to the citizens. As a result, the Republic of Serbia was compelled to lease part of the storage from the territory of Hungary. It should have been clear to anyone seriously engaged in managing energy security that it was endangered, as there is no definitive definition of energy security that does not include the component of holding reserves. Thus, despite the existence of a gas storage facility on its territory, and due to a poor sales contract and an unconducive attitude from the Russian partner, the country was forced to seek salvation in the newly emerging energy situation in the territory of another state. Only then did decision-makers in the Republic of Serbia begin to understand what energy security truly means and how important this phenomenon is for national security and the normal functioning of the state and society. This event ultimately exposed the poor decision made by previous authorities in the Republic

of Serbia to sell the majority shares of the national energy company (Naftna industrija Srbije) to a partner from the Russian Federation and demonstrated a lack of attention to the details of the contract, which could be seen as favoring the Russian partner exclusively. At that time, researchers from the Center for Strategic Analysis, appearing on television programs, recommended to decision-makers that it is high time to regard energy security in a serious and pragmatic manner and to incorporate it into the National Security Strategy. Unfortunately, our appeals went unheeded by the relevant authorities, and we faced numerous criticisms and verbal attacks for wanting to undermine traditional relations with "brotherly" Russia. When Europe consolidated and, together with other partners from the democratic community, began to impose economic sanctions on the Russian Federation, our Center warned that it was only a matter of time before the Oil Industry of Serbia would also be subjected to sanctions due to the fact that its majority owner is a company from the Russian Federation. Despite this, our analyses and public appearances did not succeed in compelling decision-makers to take energy security and the potential consequences of its disruption more seriously.

Three years later (2025), the Republic of Serbia again faces a serious threat to national security due to the aforementioned contract with Gazprom from 2008. Specifically, the U.S. Department of the Treasury sent a warning to the Serbian authorities that it intends to impose sanctions on the Oil Industry of Serbia as part of a package of measures aimed at limiting the presence of Russian capital outside the borders of the Russian Federation. Thus, the scenario we warned about at the very onset of Russia's full aggression against Ukraine is unfolding. The actions taken, as evident from open sources, by the Government of the Republic of Serbia indicate complete unpreparedness for such a scenario, lacking a clear strategy and action plans designed for such a situation. The only proposed temporary solution that has come to public attention was the Government of the Republic of Serbia's request to postpone the application of sanctions for 90 days to find a resolution. The request was answered by granting a deadline of 30 days for the situation regarding ownership of the company to change, specifically for the Russian side to be removed from ownership. One does not need to be particularly analytically educated to conclude that the request was sent in the hope that a change in administration in Washington might lead to some global agreement between America and Russia that would lift all sanctions against the Russian Federation, which would also include those imposed on the Oil Industry of Serbia. Unfortunately, this merely indicates that there is currently no adequate plan to protect the energy security of the Republic of Serbia and its national interests through the lens of energy. It also shows that a harmful contract, which has posed significant risks to energy security and thus to the national security of the Republic of Serbia since its signing, is being consciously extended. On the other hand, there has been no information regarding the solutions proposed by the Russian partner, which suggests either no solutions were offered or that

the solutions proposed by the Government of the Republic of Serbia were rejected. In this specific case, a catastrophic mistake regarding energy security has been made. The problem that arose in 2022 due to the gas crisis has escalated into an issue with the same cause—Russian capital in NIS—which threatens not only gas supply but also oil and petroleum derivative supplies since NIS owns the only oil refinery in Pančevo and a series of various facilities. The application of sanctions in an unprepared environment would lead to supply chain disruptions throughout Serbia due to the monopolistic position concerning gas, as well as the majority share in supplying petroleum derivatives within the Republic of Serbia.

It is important to note that NIS and Gazprom have 327 gas stations in the territory of the Republic of Serbia, out of a total of 1,526 according to the Ministry of Trade records from 2025[16], or as main competitors (Knez Petrol, Lukoil, Eko, and OMW) combined. This fact, in conjunction with the positioning of NIS gas stations providing service to the majority of the citizens of Serbia, underscores the significance of the issue concerning the threat to energy security in the Republic of Serbia in the event of an emergency situation to which NIS, as the majority supplier to citizens, could be exposed. Additionally, issues with NIS, aside from sanctions from democratic states due to Russian aggression in Ukraine, may stem from other factors evaluated through the lenses of energy security in the 21st century.

One key factor in studying energy security is, without a doubt, the supplier of energy resources. Until the onset of Russian aggression in Ukraine, the only gas supplier for the market of the Republic of Serbia was the Russian Federation. This fact must not be justified by the notion that the situation in Europe was peaceful. Even in a state of eternal peace and harmony, having a single supplier for any product, especially gas, which serves not only as an energy source but also as a political weapon for influence, pressure, and coercion, is, at the very least, irresponsible. It remains to be determined whether such a situation arose from negligence or was consciously allowed by those responsible for preventing it. In any case, having a single energy supplier results in an energy security index of zero, meaning the state is considered energetically insecure. Adding to this is the fact that this supplier is also the majority owner of gas fields within the country, specifically within the Republic of Serbia, as well as the majority owner of the aforementioned only gas storage facility. Thus, it can be said that the Republic of Serbia not only has a low energy security index concerning natural gas but that its energy and, consequently, national security is seriously threatened. Concerning gas storage, the Energy Development Strategy of Serbia until 2040 has allocated as much as 250 million euros for the expansion of the Banatski Dvor storage capacity and the construction of a new one in Itebej. A logical question arises: why would Serbia invest in something over which it does not have majority control, but rather a Russian partner does? Here, a legitimate question arises as to why the authorities responsible for conducting energy policy did not attempt earlier to diversify gas sources and seek

16 https://must.gov.rs/tekst/384/javna-baza-benziskih-stanica-u-srbiji.php

alternative suppliers. By 2024, Serbia had only two gas entry points: one through Hungary and the other through the Balkan pipeline. One logical question that constantly lingers is why there has been a delay for years in constructing the gas interconnector between Niš and Dimitrovgrad, which connects the gas network with the pipeline importing gas from Azerbaijan, while at the same time allowing for the purchase of gas from Turkey and converted gas from the Greek port of Alexandroupolis, where liquid gas from America arrives but can also be sourced globally. If we look at the most commonly used method for measuring energy security, known as the Shannon-Wiener index, which is based on the degree of diversification and the market share occupied by suppliers, we will see the significance of this gas corridor for the national security of the Republic of Serbia when viewed through the lens of energy security. This gas connection was only executed after pressure from the European Union and its majority financing. The total value of the Niš-Dimitrovgrad-Bulgaria gas interconnector is 85.5 million euros, of which the European Investment Bank (EIB) is financing 25 million euros, 49.6 million euros is grant co-financing from the European Union via pre-accession IPA funds, while the remainder will be covered by the Serbian budget and the state-owned company Srbija gas. This connection has the potential to satisfy as much as 60 percent of Serbia's gas needs, thereby reducing dependency on the Russian Federation and significantly raising the levels of energy independence and national security. This is particularly significant considering the more than favorable relations between the Republic of Serbia and Azerbaijan, the stability of that country, and its non-interference in internal matters, unlike the Russian Federation. This likely also explains why this gas route is not being fully utilized. An additional benefit Serbia could gain by fully utilizing this pipeline is the opportunity to develop gas infrastructure in the southern part of its territory, where a majority of households still rely on wood and coal for heating, significantly contributing to air pollution. Moreover, by developing gas infrastructure in southern Serbia, conditions for industrialization and attracting foreign direct investment would be created, helping to prevent the migration of the population from rural areas to overcrowded cities and raising living standards not only in that region but throughout the Republic. Thus, utilizing the gas connection with Bulgaria would provide the opportunity to procure gas from multiple sources through an additional route, significantly enhancing the energy security level of the Republic of Serbia. In this way, gas could be supplied from countries that do not have the political issues that the Russian Federation has due to international sanctions, which significantly affects energy security according to the Energy Security Index.

Summary and Recommendations

The Republic of Serbia currently cannot fully free itself from Russian gas, which this country has evidently used as a method of influence and pressure on the entire Serbian society. Even if the nationalization of the Oil Industry of Serbia were to occur or if

a third party were to buy out the stake of the Russian partner, there remains a need for 40 percent of gas that can currently only be satisfied from the Russian Federation. However, by utilizing the full capacity of the newly opened gas connection with Bulgaria, most of the gas can be procured from various sources characterized by stability in their political systems and security of supply, thus significantly reducing the influence and pressure from Moscow, if this is recognized as an interest by decision-makers. As part of measures to enhance energy security regarding gas, negotiations must certainly be conducted to connect pipelines that are planned for construction in the near future in the region. Serbia can offer investors to be a partner in construction or to pre-book certain quantities at favorable prices. One of the most certain options is to connect to a gas pipeline financed by Israel, Cyprus, and Greece, which is planned to reach Italy after first passing through the Albanian port of Durrës. Until then, the Republic of Serbia can purchase Cypriot gas through the Alexandroupolis port in Greece, which, according to an agreement between the Republic of Cyprus and Egypt from February 2025, will be processed in Egypt and further distributed to buyers. One method to counter Russian influence through gas is the purchase of Israeli gas, which this country will transport to Egypt via underwater infrastructure, from where it will be transported to EU ports based on an agreement from Cairo in 2022, with the Greek port of Alexandroupolis emerging again as an important factor. In that context, the Republic of Serbia must work with its partners (Bulgaria and Greece) on the urgent increase of capacity from the mentioned port to the interconnector between Serbia and Bulgaria. In addition to these recommendations, the most crucial action is to either nationalize NIS, which the Republic of Serbia has the right to do due to jeopardized national interests, or, in the absence of American sanctions against NIS, to revise the contract in order to grant Serbia the right of first usage for the Banatski Dvor gas storage facility. Furthermore, the contract revision should also cover potential sites for constructing new gas storage facilities, which, due to disastrous decisions by previous authorities in Serbia, are now largely owned by the Russian partner. If this is recognized as an interest by decision-makers.

Overall, if decision-makers decide to eliminate Russian influence, thereby raising the level of energy security, it is necessary to engage in long-term strategic planning that includes the mentioned countries and to implement the plan through various types of partnerships. This recommendation is particularly important given the data from the Energy Development Strategy of Serbia, which shows that despite the anticipated development of renewable energy sources, natural gas will still play a crucial role in Serbia's electricity production by 2040. Some of the proposals for diversifying and reducing Russian gas influence can also be found in the Energy Development Strategy, along with cost calculations, so now everything is in the hands of decision-makers.

Oil and Oil Derivatives as national security risk

The situation with oil and oil derivatives is largely similar to that of gas. The only oil refinery is located in Pančevo and is part of NIS, meaning that the Russian partner also has majority ownership over it. Although NIS owns about 20 percent of gas stations in Serbia, its influence is significantly greater than that percentage because a large number of small entrepreneurs (over several hundred stations) purchase fuel directly from the NIS refinery, while only international chains import fuel from the EU to sell at their pumps; this does not prevent them from purchasing the same fuel from the NIS refinery when needed.

Thus, when applying any of the indices used to assess energy security, it can be stated that the energy security index for oil and oil derivatives is at a rather unfavorable level. In the event of any accident at the refinery that is predominantly owned by the Russian partner, or the strict implementation of harsher sanctions, there is a real danger that the gas stations supplying the majority of the population and the economy in the Republic of Serbia will run out of fuel, leading to significant disruptions in supply chains and the normal functioning of Serbian society. This provides yet another reason for decision-makers to seriously consider ways to remove Russian capital from NIS. The poor energy security index is further exacerbated by the fact that the refinery in Pančevo is exclusively supplied with oil from a single direction, through the JANAF pipeline from the port of Omišalj on the Croatian island of Krk. Any crisis along this pipeline, which is over 700 kilometers long, could seriously threaten energy security in Serbia. To avoid this situation, Serbia intends, at least according to statements from officials, to construct a pipeline with Hungary that would connect to the Druzhba pipeline, which supplies Russian oil to Europe. For Serbia, this is the most financially economical way to achieve another supply channel, but it raises questions about the dependence on the Russian side, which would, in this case, be maximal. In this way, the Republic of Serbia is essentially trying to bypass the sanctions of the American administration and protect its Russian partner, rather than placing its own interests at the forefront. Financing the pipeline to enable the Russian partner to continue operations and avoid American sanctions, as well as to replace non-Russian oil with Russian oil, indeed borders on very poor strategic foresight.

Summary and Recommendations

The Republic of Serbia has the opportunity to build its own refinery that would be 100 percent state-owned, thereby ensuring lasting stability regarding oil and oil derivatives. This refinery can enhance market competitiveness, produce much higher quality fuel while adhering to the highest global standards, and open up new jobs. Additionally, this new refinery could be constructed in partnership with companies based in democratic countries that do not face any sanctions.

However, this scenario, proposed for Smederevo, still represents a significant initial expenditure. For the state of Serbia, a much cheaper and quicker solution would be to replace the Russian partner in NIS with one of the Western European or American partners, thereby further strengthening ties with the bloc of democratic nations and irrevocably paving Serbia's way towards them. Connecting to the Druzhba pipeline would only represent a superficial diversification that leads to stable supply, as it creates another route for oil to be delivered to the refinery in Serbia, which under normal circumstances represents a significant advancement. However, in this case, the problem remains with the country of origin, i.e., the connection with the Russian Federation, which is the root of the entire situation. In short, Serbia must eliminate its ties with Russian capital when it comes to oil and oil derivatives, regardless of their origin, whether Russian pipelines are used, or whether Russian capital is present in Serbian refineries and the oil industry.

Nuclear Energy as national security risk

In Serbia, the moratorium on the construction of nuclear power plants ended at the end of 2024. Since then, there has been considerable public discussion on this topic. Serbia faces a straightforward choice: whether to build a traditional nuclear power plant, which would take about ten years and cost over 15 billion euros, or to proceed with the installation of small modular reactors, which the government has mentioned multiple times. In both cases, the nuclear energy project, aside from ensuring Serbia a permanent and inexpensive supply (excluding initial investments), could provide it with a significant strategic partnership. And not just any strategic partnership, but one that could represent the most vital element of energy and, therefore, national security for the Republic of Serbia due to the importance of the topic. It appears that the main dilemma for decision-makers in Serbia lies here: whom to choose as a partner? A rational analysis after reading the previous lines suggests that it should be anyone but Russia. Russia as a partner is the wrong choice for several reasons.

First, as previously demonstrated, Serbia is already in a precarious and realistically unacceptable energy dependence on Russia. Building a nuclear power plant with a Russian partner would turn the citizens of Serbia into energy slaves of the Kremlin.

Second, Russia is currently under sanctions from the democratic world due to armed aggression against a neighboring country, a UN member state to which Russia guaranteed security after Ukraine relinquished its nuclear arsenal following the collapse of the Soviet Union. So, can they be trusted when it comes to serious contracts?

Third, if we analyze the rhetoric of Russian officials, consider that the Russian economy has been shifted to a wartime regime, and examine their statements on state television, no one can claim that Russia does not intend to attack another state, such as Moldova, Georgia, or one of the Baltic states. Their hybrid actions, initially developed by the infamous KGB as "active measures," undermine democracy wherever it appears in the former Warsaw Pact countries and the former Yugoslavia. From this, it can be concluded that the question

of lifting sanctions is very uncertain, and restoring trust is even more so. And finally, what if they are sanctioned again?

Fourth, the consequences of sanctions and an economy operating in a wartime regime certainly lead to a lag in science and modern technologies in all areas, including nuclear energy. It follows that, as a result, Russian scientists are falling behind their Western counterparts.

Fifth, a very practical question is the maintenance of a complex system should any of the aforementioned scenarios occur.

Sixth, if there is an excess of energy from the nuclear power plant and Russia is under sanctions or simply has a bad reputation, as it does today, will anyone from our surrounding region want to buy even a single kilowatt produced with Russian involvement?

Summary and Recommendations

The future of the Republic of Serbia, which strives to attract as many foreign companies and capital as possible, largely depends on its energy capacities. There can be no economic development without energy, and Serbia is aware of this. It is also aware of the strategic implications when choosing a partner for the construction of a nuclear power plant. The partner that Serbia selects for this project will chart the path of its future. Decision-makers have a straightforward choice: pursue democracy and overall development by partnering with Norway (for modular reactors) or the U.S., France, etc., for traditional nuclear power plants, or choose isolationism and dictatorship by selecting the Russian Federation as a partner, which carries significant uncertainty regarding quality and maintenance. Of course, the aspect of savings must not be overlooked, as the use of nuclear energy would significantly reduce coal consumption, leading to decarbonization, a decrease in respiratory ailments, and positive environmental impacts. Additionally, it would reduce the use of gas, thereby decreasing dependency on political influence from Russia.

Wind and Solar Energy as national security risk

According to the energy development strategy in Serbia, the greatest growth in energy production is expected to come from these sources. The Ministry of Energy predicts that the total share of energy produced this way by 2040 will be around 40 percent, with energy production from solar fields expected to be 15 times greater over the next 15 years, and energy derived from wind expected to be 4 times greater. Given that we have a situation here similar to gas 20 years ago when mass gasification began in Serbia, it must not be allowed for foreign partners to be introduced haphazardly and without planning, so as not to fall into a dependency trap as with gas. It is true that solar fields and wind farms will physically be in Serbia, but the produced energy will be in the hands of their owners the moment sufficiently large storage batteries appear on the market.

Hydro energy as national security risk

As outlined in the energy development strategy, hydro energy plays a significant role in energy supply in Serbia. Thanks to this form of energy, dependence on imports is reduced. What is certainly lacking in the Republic of Serbia is an increase in these capacities. Therefore, if it is known that this form of energy strengthens energy security and reduces dependence on other countries, care must be taken in choosing partners with whom new hydropower plants would be constructed. The best solution for Serbia, in this regard, would be to build Đerdap 3 in partnership with Romania without involving any of our partners, if there are financial conditions and technical capabilities regarding contractors and personnel who would manage the business after construction is completed. This would be done through a standard commercial loan. If that is not the case, one should follow the principle, similar to the potential construction of a nuclear power plant, in selecting a partner that would also facilitate Serbia's entry into a strategic partnership with the partner's country, while avoiding the Russian Federation due to the existing dependence, as well as China, where Serbia is already significantly indebted due to interstate agreements financing infrastructure projects, and given the EU and U.S. stance on Chinese investments. Serbia must not allow any actions that would jeopardize its accession negotiations with the European Union or its energy agreement with the U.S.

A very significant fact in the strategy is that the construction of a hydropower plant on the Drina River, which represents the border with Bosnia and Herzegovina, largely depends on agreements among the entities in that state. Here we can see how important it is for Serbia, as a guarantor of the Dayton Agreement, to maintain good relations with all parties in Bosnia and Herzegovina and how this can impact ordinary citizens on both sides of the Drina. The construction of a hydropower plant on the Drina would greatly increase the stability of supply in that part of Serbia and Bosnia and Herzegovina, thereby directly affecting the quality of life for all and, consequently, national security.

Energy Security in Strategic Documents

Although it is evident that energy security is one of the foundations of national security due to the role of energy in everyday life, it has not received satisfactory attention in strategic documents. The last strategic document mentioning energy security is the Energy Development Strategy of the Republic of Serbia until 2040, with projections extending to 2050, which was adopted by the National Assembly of the Republic of Serbia at a session held on November 27, 2024.

In this document, which outlines everything that needs to be done in the field of energy by 2040, key issues related to energy security are mentioned insufficiently; it could be described as politically correct but certainly not proactive, which leaves open the possibility

for imprecise action plans through which the strategy should be implemented, i.e., for the Program for Achieving the Strategy (PAS) and the measures for their realization. On the other hand, it must be acknowledged that the document can serve as a good starting point for a future National Security Strategy that should objectively and, above all, adequately address energy security in the interest of the Republic of Serbia. The document begins by stating that the decarbonization of Serbia, along with the transition to renewable energy sources, is crucial for the energy security of the country. However, it fails to mention that production from renewable sources should be structured in such a way that no foreign partner has a majority influence, as previously described in the context of gas and oil derivatives. Additionally, the document states that changes in the energy sector will be aligned with strategic documents and activities in various fields, but it does not reference the strategic documents related to the national security of Serbia, whose changes have been announced from the highest state level. It raises the question of why, if it was not insisted upon, it was at least not mentioned that energy security should be included in those documents. In section 4.1, at the very end regarding energy security, the current situation with gas is described in just two sentences, and a negative opinion is expressed about obtaining gas from only one source. A tabular representation shows the gas dependency in the production of thermal energy, with gas constituting a staggering 85 percent by 2025! In the same table, a very optimistic growth of other energy sources such as biomass, heat pumps, and solar energy is displayed, but gas still remains high in the projections for 2040 at 50 percent. Unfortunately, there has been no further advancement in proposing new supply directions or suppliers, as discussed in previous sections of this analysis. More can be learned about proposals in section 7.5, which includes an adequate observation of the need for gas diversification but lacks sufficient correlation with national security, which can be justified as this is primarily an energy-focused document.

The overall impression is that the document aims to enable significant development of renewable energy sources (RES), which is certainly commendable, as well as the trend towards decarbonization. However, the question arises: should Serbia be an energy hostage of the Russian Federation until then? Until 2040 or 2050, when it is assumed that decarbonization using RES will prevail.

In section 5.2, which discusses oil and gas production, the reader could easily conclude, due to the frequent use of the term "domestic production," that this is indeed the case, as it is not mentioned anywhere that the Russian partner is the majority owner of all oil and gas produced in the territory of the Republic of Serbia. A more realistic term would be "production on the territory of the Republic of Serbia." Naturally, there is no mention of the negative impact this has on the energy security of the Republic of Serbia. Additionally, when listing the goals of energy policy, there is no mention of the diversification of supply sources regarding gas, nor is there any mention of the possibility of reducing dependence

on Russian gas, even though the document announces the construction of new gas power plants in Novi Sad and Niš.

Overall, the impression given while reading the document is that energy security is interpreted too narrowly, solely through the supply domain in terms of quality and continuity, without considering the repercussions for national security and, consequently, for society as a whole. There is a minor exception when it is mentioned that gas could potentially be supplied to Serbia from a greater number of countries, but this is framed solely as a possibility rather than an intention.

The reasons for such an approach remain unclear, but one of the most important factors is certainly that the current National Security Strategy does not recognize the importance of energy security. If a new National Security Strategy were to be adopted that clearly defines the role of energy security and the direction in which energy should develop as one of the pillars of national security, then we could expect the Energy Development Strategy itself to be more concrete, with multiple action plans and a genuine sense of purpose. It can be heard that some argue that at the time of the adoption of the currently valid National Security Strategy (2019), there was no armed conflict between Russia and Ukraine, which is true. However, this is not a justification because the first serious gas crisis occurred long before the armed conflict, during 2005-2006, revolving around gas prices and Ukraine's claims that Russia was not honoring the interstate agreement on gas pricing and transit across Ukrainian territory. At that time, the gas supply to several EU member states was called into question, and since then, opinions within the EU regarding the dangers of dependence on Russian gas have been evident.

One does not need to be particularly wise to conclude that Russia significantly raised gas prices for Ukraine after pro-European politicians came to power in that country and that this move was a form of punishment for breaking free from the Kremlin's embrace. The consequence of the misunderstanding with Ukraine was a reduced flow of gas to numerous EU countries, by which Russia sought to punish the EU for supporting Ukraine and its distancing from Moscow, while also using gas as a weapon of coercion to achieve its geopolitical goals. This was the first example of the use of gas as a weapon in the 21st century and the securitization of this energy resource. It must have been clear to decision-makers at that time that energy dependence has several dimensions that impact energy, and thus national security, which now need to be considered in the formulation of a new National Security Strategy for the Republic of Serbia, as well as a foreign policy strategy, which will represent a novelty in strategic documents.

The first dimension is certainly the natural-technical dimension, which relates to the reserves of a particular energy resource on the territory of Serbia. Regarding oil and gas, the reserves of gas are very small, and there is no possibility of increasing production, which laypersons might say should not be paid too much attention to, which is likely why they

were so easily included in the purchase agreement with the Russian partner. However, as previously described, this small number of gas and oil reserves directly leads to an even smaller number of places where gas can be stored, which is of exceptional importance for energy and national security. On the other hand, in terms of hydro energy, the potentials are significant and can greatly enhance energy security, so it is essential to carefully consider the choice of potential partners in their utilization. The next dimension is the economic one. An indisputable fact is that gas is currently the cheapest energy source in Serbia for industry, especially when considering the emission of harmful gases. All investors who have come to Serbia have required a connection to gas for their production facilities. Simply put, without gas, there are no investments, and without investments, there are no jobs or contributions to the budget for social expenditures. If we have a single supplier from whom we are gas-dependent, they directly influence our economy through quantities, quality, and prices. A strong economy is fundamental to citizen satisfaction, which is essential for the stability of a state. Thus, this is yet another reason for energy security to be included in the National Security Strategy and for careful consideration when selecting a partner for a potential nuclear power plant that produces the cheapest energy.

Finally, the last dimension of energy security and dependency is inevitably political. Numerous examples range from the increase or decrease in oil production among OPEC member states to Russian gas trade, illustrating the political influence that monopolistic states wield in energy trade. Their influence stems from the awareness that the economies of many states—and consequently, their political systems and the elites that govern them—are hostages in this game. In this way, by using energy resources as weapons, they attempt to achieve their geopolitical goals, grouping the ruling elites of energy-dependent states to serve as their agents of influence, initially among the local populations and subsequently beyond their borders, presenting them as very successful in implementing economic and social policies and as friends of those who control energy resources.

Conclusion as a Recommendation

When adopting the latest National Security Strategy of the Republic of Serbia, it is evident that an assessment of the country's energy security was not conducted in a proper, objective manner. This can be concluded from the very sparse presence of energy security within the Strategy itself and the lack of any analysis of potential scenarios for the disruption of energy security and the impact that such disruptions would have on national security. If such an approach had been taken, we would have seen proposals for decisions aimed at improving energy security based on the Strategy, referencing it accordingly. These shortcomings must certainly be rectified during the development of a new National Security Strategy or included in a new document that would be compatible with it, namely, in the Energy Security Strategy of the Republic of Serbia, which should comprehensively address this issue along with the establishment of action plans for implementation.

National Security Strategy and Energy Security

The last National Security Strategy of the Republic of Serbia was adopted on December 27, 2019. Even at that time, numerous security and economic disturbances were present in the broader environment and should have been considered during its preparation. Instead, it merely states that the demand for oil and gas will continue and increase. It does not mention, or predict, decarbonization; rather, it emphasizes the dominance of fossil fuels, even though the trend towards decarbonization was already a new reality within the European Union to which Serbia declaratively aspires. This is coupled with the assertion that energy from renewable sources is unlikely to increase its percentage in global consumption. From today's perspective, particularly after the adoption of the Energy Development Strategy of the Republic of Serbia, this outlook is entirely misguided and shortsighted.

The only reality related to energy security presented in the Strategy six years ago is the mention of limited capacities for the import and storage of energy resources and that this could negatively impact energy security. This could have been sufficient to prompt more serious actions to change such a situation, especially regarding gas storage and avoiding monopolies in the supply of oil and oil derivatives. It should be noted that the diversification of gas supply, which was implemented only five years after the adoption of the strategy, remains unsatisfactory.

It can be confidently stated that there is no logical explanation for why energy security is not sufficiently represented in the National Security Strategy or why it has not been amended in the past six years. This is particularly true when considering the market disturbances caused by Russian aggression against Ukraine on one side and the EU's approach to the newly emerging problem on the other, all through the lens of Serbia's publicly and officially declared desire to one day join the EU.

We hope that the signed energy agreement with the U.S. will compel decision-makers to pay attention to how a new energy partner views energy security. The U.S. has treated energy security very seriously since the time of President Carter's administration when John Deutch, the CIA director, and James Schlesinger, the Minister of Defense and the first Secretary of Energy, wrote a comprehensive study on the importance of energy security and its impact on national security, viewed at that time through oil as the key energy resource of the era. A careful reading of the aforementioned study, which describes potential scenarios of oil market disturbances and their implications for national security, can at the very least motivate readers to draw parallels with today's gas market situation. Back then, the authors spoke about the significance of energy resources in geopolitical movements and their influence on the national security of states.

Manipulative campaigns and the influence of disinformation on public opinion in the field of energy security

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INTRODUCTION

The concept of energy security represents a significant aspect of the overall modern security challenges faced by contemporary states. Energy security is essential for the stability and development of any modern state, and Serbia is no exception in this regard. The status and prospects of this aspect of national security have multiple significances and directly impact on the economy, domestic and foreign policy, as well as the country's international relations.

In terms of economic significance, energy security is a key factor in the stability of the economy. Reliable energy supply is fundamental for the functioning of industries, businesses, and households. Problems in the energy sector can lead to price increases, a lack of investment, recession, and job losses. Furthermore, this aspect of security has a significant impact on energy prices and inflation. The prices of electricity, gas, and oil directly affect production costs and the living standards of citizens, while instability in supply can lead to rising inflation and economic uncertainty. Energy security is crucial for attracting foreign investments, as investors seek stable and predictable business conditions. This is especially important in the context of continuously growing overall energy consumption, which is a key characteristic of rapidly developing societies transitioning to a digital economy. On the other hand, instability can deter investors from industrial, infrastructure, and digital economy sectors. Additionally, Serbia has the potential to develop renewable sources (wind, solar energy, biomass), which can reduce dependence on imports and contribute to the long-term energy stability of the country.

Beyond its economic significance, the concept of energy security has undeniable political importance. Issues of energy security are often used as part of political campaigns, and energy crises can trigger social unrest and government destabilization, thereby

affecting the overall internal stability of the political system. Furthermore, stable energy supply, affordable prices, and state subsidies for energy resources directly influence the living standards of citizens and their support for political actors. On the other hand, issues like energy transition create political resistance. The shift from fossil fuels to renewable energy sources (RES) can provoke opposition from certain interest groups (the mining sector, oil and gas industry), potentially affecting the political decision-making process.

The question of energy security has significant implications for international relations and the geopolitical aspect. In Serbia's case, the primary situational factor is its dependence on energy imports. Serbia is significantly dependent on the import of Russian gas and oil, making it vulnerable to global geopolitical changes and potential sanctions. This factor significantly affects its relationship with Russia as its main supplier of imported energy resources. Long-term contracts with Gazprom and the presence of Russian energy companies in Serbia mean that Serbia's energy policy directly influences the bilateral relations between the two countries, while also being dependent on those relations. Conversely, due to its significant energy dependency and high exposure to Russia, Serbia often faces the risk of pressure from the EU and the USA, which encourage candidate countries for EU membership to reduce dependence on Russian energy and accelerate the green transition, posing challenges in strategic decision-making.

Challenges and solutions regarding energy security serve as a motivating factor for regional energy cooperation. Serbia participates in regional energy projects, such as the Balkan Gas Corridor, which can contribute to the diversification of supply and reduce dependence on a single supplier.

Finally, as an essential part of the question of long-term energy security, the green agenda and access to international, primarily EU funds for its realization arise. Within the framework of European integration, Serbia must align its energy policy with EU standards (decarbonization, reduction of CO_2 emissions) in order to utilize European funds for energy transition, which represents a challenge for Serbia's energy policy as well as a significant development and transitional opportunity for the overall development of the country's energy sector. From all of the above, it is clear that energy security is a strategic issue for any modern state, as it impacts its economic stability, political situation, and international standing. Considering the dependence on fossil fuels and geopolitical challenges, Serbia must diversify its energy sources, accelerate the development of renewable energy, and build a more resilient energy system to ensure security and stability in the face of growing energy demand in the long term. Various and often opposing geopolitical, economic, and other interests arise as obstacles on this path, with their proponents using different channels of influence to align Serbia's energy agenda

with their own interests and direct it in the desired direction. To this end, channels of media and informational influence are often employed, which frequently resort to illicit means in the form of disinformation campaigns, targeted shaping of public opinion, and hybrid actions that pose increasingly serious security challenges for all countries. Due to specific socioeconomic, geopolitical, and cultural factors, Serbia is particularly vulnerable and sensitive to these types of security challenges.

OBJECTIVE OF THE ANALYSIS:

As a significant segment of the overall energy security of modern states, challenges arise from disinformation campaigns and the targeted dissemination of information regarding energy security, as well as hybrid actions in this area, to which Serbia shows a relatively low level of resilience. The main objective of the analysis is to recognize, identify, and document key disinformation that is present in the public space regarding Serbia's energy security. This aspect of the analysis includes: identifying dominant narratives (what untruthful or manipulative claims most frequently appear; are they aimed at discrediting certain political decisions, inciting fear, polarizing society, or strengthening dependence on particular energy actors?); areas of disinformation (do the disinformation relate to energy sources, supply, prices, energy transition, international agreements, or geopolitical pressures?); forms and formats of disinformation (are they present in the form of fake news, manipulative headlines, twisting of context, selective presentation of data, or through campaigns on social media?); and comparison with real data (comparing disinformation with verifiable data from reliable sources—reports from energy agencies, expert analyses, international organizations, and investigative journalism).

The analysis also aims to identify the actors responsible for spreading disinformation about energy security. This section encompasses: media sources (which media outlets most frequently disseminate disinformation; are they tabloids, internet portals, national television stations, or alternative media?); political actors and interest groups (do certain politicians, parties, energy lobbies, or other organizations have an interest in manipulating information regarding energy?); foreign influences (are there indications of external actors promoting or inciting disinformation, such as pro-Russian or pro-Western narratives, and the economic and geopolitical interests of major powers, particularly their compatibility and alignment with Serbia's national and energy interests?); public opinion creators and non-expert analysts (how do individuals lacking credibility in the field of energy contribute to the spread of inaccurate information?).

Disinformation about energy security can significantly influence citizens' perceptions, shape public policies, and inform strategic decisions, raising concerns about the impact of disinformation on public opinion and the political decision-making process. This aspect of

the analysis includes: citizens' perception of energy security (do disinformation campaigns create feelings of panic, insecurity, or support for certain political options?); influence on public opinion formation (how do false information affect citizens' attitudes towards Serbia's energy policy; do they foster distrust in institutions, international partners, or domestic energy projects?); effect on the political decision-making process (can the spread of disinformation lead to poor decisions in energy policy, such as delaying the energy transition, harmful contracts, refusing to diversify supply sources, etc.?); impact on Serbia's regional and international position (can disinformation threaten international cooperation in the energy sector, slow down European integration, or disrupt relations with key partners?); social polarization and conflict (do disinformation contribute to creating divisions among citizens, fostering pro-Western and pro-Russian energy narratives that provoke political and social conflicts?). Combined analysis of disinformation, their sources, and effects on public opinion provides a deeper understanding of how information about energy security in Serbia is manipulated. The ultimate goal is to contribute to the media and energy literacy of citizens, as well as to develop recommendations for combating disinformation and strengthening responsible media reporting on this crucial topic

METHODOLOGICAL FRAMEWORK:

The methodological framework for analyzing disinformation about Serbia's energy security is based on a combined methodological approach that encompasses the collection, systematization, and analysis of data from various sources to identify key narratives, disinformation, their sources, and their impact on public opinion. The research methodology includes the following key aspects: data collection methods, areas of monitoring, and types of analyses as essential methods for processing and interpreting data.

Regarding data collection methods, the following were used:

- Media Content Analysis: This included the collection and analysis of articles, news, comments, and analyses from domestic and international media reporting on Serbia's energy security. The monitoring covered traditional media (TV, radio, print) and digital media (portals, blogs). The focus was on identifying disinformation, fact-spinning, unverified claims, and biased reporting.

Within the identification of information sources, primary data sources mentioned in media and social publications were verified (institutional sources, official energy agencies, international organizations). Links between certain media and political, economic, or foreign interest groups were analyzed. Special attention was paid to disinformation arising from unnamed or unreliable sources and their further distribution.

In terms of monitoring areas, key aspects of energy security susceptible to disinformation were tracked, and the analysis encompassed the following areas:

- Energy Supply: Are there manipulations in reporting on the stability of gas, electricity, and oil supply?

- Energy Prices: Are inaccurate information disseminated about the causes of price increases and responsibilities for price changes?

- Energy Agreements and Geopolitics: Are there disinformation regarding international energy agreements and Serbia's relations with Russia, the EU, and other actors?

- Renewable Energy Sources: Are false information spread about the capacities of RES and their impact on energy security?

- Role of International Institutions: Are the EU, IMF, World Bank, and other institutions targets of disinformation in the context of energy reforms in Serbia?

During the research and analysis, the following were used:

- Quantitative Analysis: This involved techniques for data collection using software tools for analyzing social media and media content; the number of posts, articles, and comments containing disinformation about energy security was identified; trends over time periods were analyzed—when disinformation was most prevalent and in what contexts.

-Qualitative Analysis: This analyzed the structure of disinformation: how they were formulated, whether they relied on emotions, fear, conspiracy theories, or manipulation of facts; key actors spreading certain narratives and their interests were identified; disinformation was compared with official and verifiable data to determine the degree of manipulation.

- Network Propagation Analysis: This method was used to track the flow of disinformation—how certain claims begin, how they spread, and who takes them up; networks of bots, fake profiles, and coordinated campaigns supporting certain narratives were identified.

The combination of quantitative and qualitative methods allowed for a comprehensive insight into how disinformation about Serbia's energy security is disseminated and its effect on public opinion. The analysis of media content, social networks, and information sources helped identify key disinformation narratives, the actors spreading them, and their potential impact on decision-making in the energy sector. This methodological approach has provided objective and measurable data that can serve as a basis for combating disinformation and promoting accurate and reliable information about Serbia's energy security.

CONTEXT OF ENERGY SECURITY IN SERBIA:

The energy security of Serbia is shaped by a combination of factors including domestic energy production, reliance on imports of key energy resources, and strategic energy policies aimed at ensuring supply stability. When considering the overall context of Serbia's energy security, several aspects are crucial.

1. Reliance on Energy Imports

Serbia is significantly dependent on energy imports, particularly when it comes to natural gas and oil. Regarding natural gas, over 85% of Serbia's gas needs are met through imports, predominantly from Russia via the Turkish Stream pipeline. Although there are plans for diversification of sources (such as the construction of an interconnector with Bulgaria that allows access to gas from Azerbaijan and LNG terminals in the Greek port of Alexandroupolis), the reliance on Russian gas remains a key factor in energy policy.

In terms of oil and oil derivatives, Serbia imports most of its crude oil, a significant portion of which is processed at the Pančevo Refinery, which is managed by NIS (majority-owned by Russian Gazprom Neft). Serbia's most significant energy production comes from electricity. Traditionally, Serbia produces sufficient electricity to meet its own needs; however, in recent years, import costs have risen due to issues in thermal power plants and increased consumption. Overall reliance on imports makes Serbia energy-vulnerable to global crises, supply disruptions, and geopolitical pressures.

2. Capacities for domestic energy production

Domestic energy production in Serbia relies on several key sectors.

Coal-Fired Thermal Power Plants: Approximately 70% of the total electricity is produced in lignite thermal power plants (Kostolac, Obrenovac – TENT[1]). Problems with coal exploitation, outdated infrastructure, and environmental challenges lead to supply uncertainties.

Hydropower Plants: About 25% of electricity production comes from hydropower plants, with key facilities including Đerdap I and II and Bajina Bašta. In years with low water levels, hydropower production significantly declines.

Renewable Energy Sources (RES): Wind farms and solar panels are on the rise but still constitute a small part of the energy mix (about 4-5%). The government is gradually increasing capacity, but investments in green energy remain below the EU average. Overall, domestic production meets most electricity needs, but dependence on coal and climatic conditions affecting hydropower makes the system vulnerable.

3. Energy Policies and Plans for the Future

Serbia seeks to enhance its energy security through several key strategies:

1 https://www.eps.rs/lat/poslovanje-ee/Stranice/Proizvodnja-elen.aspx

- Diversification of Gas Supply Sources: The construction of a gas interconnection with Bulgaria and potentially with North Macedonia and Romania reduces dependence on Russian gas.

- Increase in Renewable Energy Sources: The government plans to increase the capacity of wind farms and solar power plants, but greater investments and a better regulatory framework are needed.

- Modernization of Thermal Power Plants and Reduction of Emissions: Due to the requirements for meeting EU standards, Serbia must reduce CO_2 emissions and improve the operation of thermal power plants, but investments in this area are still insufficient.

- Regional Energy Cooperation: Serbia is part of the Southeastern European Power Exchange (SEEPEX) and participates in regional initiatives for energy integration.

The goal of Serbia's energy policy is to ensure stable supply while gradually transitioning to more sustainable energy sources. However, slow diversification and political challenges complicate rapid changes in the system. Serbia's current energy system relies on a combination of domestic production (predominantly from coal and hydropower plants) and imports of key energy resources (natural gas and oil). Energy policies are focused on diversifying supply and developing RES, but they are limited by financial, infrastructural, and political challenges. Energy security in Serbia remains a strategic issue, directly linked to the economy, international relations, and the sustainability of the country's future development. In addition to the capacity of the existing energy sector in Serbia, significant roles in shaping the country's energy security context are played by key international and domestic factors and actors that influence Serbia's energy stability. It largely depends on a combination of global geopolitical movements, relationships with key international partners, and domestic political and economic decisions. Key factors include the influence of Russia, the EU, China, the green transition, and geopolitical crises.

Russia: Serbia shows a high level of dependence on Russian energy sources and geopolitical pressures. In terms of imports of gas and oil, Serbia relies on Russia for natural gas supply (via the Balkan Stream), while NIS (Naftna industrija Srbije) is predominantly controlled by Russian Gazprom Neft. This dependence makes Serbia vulnerable to energy crises and political pressures from Moscow. The high level of dependence further exposes Serbia to geopolitical risks. Due to the war in Ukraine and sanctions against Russia, the EU is increasingly reducing its dependence on Russian energy,

which puts pressure on Serbia to diversify its gas and oil supplies. Additionally, Serbia's one-sided dependence on Russian supply sources significantly affects both price and supply stability. Russia offers Serbia more favorable conditions for gas, which are often exaggerated for internal political interests and goals, despite the fact that political instability could lead to supply issues or price increases.

European Union: Since Serbia is a candidate for EU membership, its energy policy faces demands for alignment with the energy strategies and policies of the EU, as well as support for the energy transition coming from EU accession funds and special arrangements with the Union and member states. As an EU candidate country, Serbia must align its energy policy with European standards, rules, and regulations, including reducing dependence on coal and increasing the use of renewable energy sources. An essential part of this alignment includes fulfilling the green agenda and decarbonization. The EU encourages Serbia to reduce CO_2 emissions and transition away from coal through the Green Agenda for the Western Balkans, but Serbia's energy infrastructure still predominantly relies on coal. Along with the criteria that apply to all candidate countries for EU membership, there are opportunities to utilize accession funds from the Union in the form of financial assistance. The EU offers investments and subsidies for energy efficiency projects, the construction of interconnectors, and the development of renewable energy sources, but implementation has been slower than expected.

China: In terms of economic and energy relations, China plays the role of a strategic investor in Serbia's energy infrastructure. Notably, investments are made in thermal power plants and renewable energy sources. Chinese companies are involved in projects aimed at modernizing Serbian thermal power plants (such as Kostolac B) and in constructing wind farms and solar power plants. Specific economic cooperation models with China could lead to long-term economic consequences for Serbia. Loans and investments from China often come with high interest rates and long-term commitments, which could limit Serbia's flexibility in the future. An important aspect of cooperation with China is also the accompanying environmental issues that often follow Chinese investments in countries with weak institutions and underdeveloped environmental protection systems. Projects in cooperation with China frequently face criticism for poor environmental standards, which can impede alignment with EU standards.

A particularly significant segment of the overall energy context of Serbia involves the issues of the green transition, as well as the challenges and

opportunities it presents. The necessity to shift to renewable energy sources (solar power, wind farms, hydropower) obliges Serbia to increase the share of renewable energy in order to reduce emissions and align with European policies. Transition also brings significant problems and challenges. Moving to clean energy requires large investments, restructuring of EPS (Electric Power Industry of Serbia), and improving energy efficiency, which is a process that takes years. The green transition also offers substantial financing opportunities. The EU, World Bank, and other international partners provide funds for the transition, but Serbia must demonstrate political will and capacity to implement reforms.

Finally, the energy context of Serbia is significantly shaped by geopolitical crises and global disruptions in energy supply. The war in Ukraine has led to a spike in energy prices and pressure on Serbia to distance itself from the import of Russian gas and oil, as well as from Russia's conditional policies regarding Serbia's geopolitical orientation. The global energy crisis, instabilities in oil and gas markets, sanctions, and disruptions in supply chains affect the availability and pricing of energy resources in Serbia. Additionally, aside from opportunities for cooperation, disruptions in energy supply can also impact regional stability. Problems in the energy systems of the region (e.g., Kosovo, Bosnia and Herzegovina) can affect the stability of electricity supply in Serbia. Serbia's energy stability depends on a variety of factors, including dependence on Russian energy sources, pressures from the EU for a green transition, Chinese investments, global energy crises, and domestic political decisions. The key challenge in the coming years will be to diversify supply sources and accelerate the transition to renewable energy while maintaining economic stability and energy security. A significant part of Serbia's overall energy context also includes the historical background of its energy security. Throughout its history, it has been shaped by changes in geopolitical circumstances, economic transformations, and crises that have affected global and regional energy markets. From the former Yugoslavia to present-day Serbia, energy stability has always relied on foreign policy relations and domestic reforms. In this regard, past energy crises have played a special role in shaping the overall context and their impact on Serbia.

- *Oil crisis of 1973 and 1979 – First global energy shocks*

The SFRY was affected by rising oil prices, but the state sought to diversify supply sources and accelerate the development of domestic coal and hydropower production. The focus was on building hydropower plants (such as Đerdap), increasing coal exploitation, and reducing dependence on oil imports from the Middle East.

- *Sanctions in the 1990s – Complete energy isolation*

Disintegration of Yugoslavia and international sanctions 1992-1995. have led to a serious energy crisis. Shortages of fuel, gas derivatives and problems in electricity supply became everyday, which further worsened the economic and political situation. Serbia relied on alternative methods of supply, including smuggling and trade arrangements with neighboring countries.

- *NATO bombing in 1999 – Destruction of energy infrastructure*

During the bombing, key energy facilities, refineries, and power lines were hit, leading to long-term electricity restrictions and a temporary collapse of the energy system. The restoration of energy capacities took years, with international assistance and a gradual opening to new investments.

- *Gas crisis of 2009 – Sensitivity to external pressure*

Due to the conflict between Russia and Ukraine over gas supplies, Serbia experienced a gas supply disruption, highlighting a high degree of energy dependence on Russian gas. In response, plans for diversification of sources were initiated, but concrete steps have been implemented slowly.

All of the aforementioned crises significantly defined potential challenges in Serbia's energy security, both in terms of their short-term and medium-term and long-term factors.

Short-term challenges (1-5 years)

Rising Energy Prices – Instabilities in the global market can lead to sudden spikes in the prices of oil, gas, and electricity.

Dependence on Russian Gas – Serbia still does not have a sufficiently diversified energy mix and relies on supply through the Balkan Stream.

EPS Capacity – Problems within EPS, outdated infrastructure, and poor management can jeopardize the stability of electricity supply.

EU Pressure for Green Transition – The EU expects a rapid reduction in coal use, which could result in energy deficits if alternative sources are not developed.

Medium-term challenges (5-15 years)

Construction of Energy Infrastructure – Serbia must invest in new capacities for renewable energy sources and develop storage capacities for gas and electricity.

Regional Cooperation – Strengthening energy connectivity with neighbors through interconnectors and joint projects can reduce dependence on a single source of supply.

Privatization and Reforms – Elektroprivreda Srbije must undergo reforms to become more competitive and efficient.

Increased Energy Consumption – Industrial development and economic growth drive demand for energy, which requires strategic planning for new energy sources

Long-term challenges (15+ years)

Complete Transition to Green Energy – Serbia will need to phase out coal by 2050 in accordance with EU policies, which requires long-term investments and a transition in the labor sector.

Global Geopolitical Trends – Balancing between Russia, the EU, China, and the USA regarding energy policy will be crucial for the long-term stability of supply.

Climate Change – Extreme weather conditions can affect hydropower and the stability of energy networks, necessitating infrastructure adaptation.

Historical energy crises have demonstrated how vulnerable Serbia is to external influences and how energy policy must be planned for the long term. Short-term challenges include stabilizing supply and prices, medium-term challenges relate to reforms and investments, while in the long term, Serbia must become energy sustainable through the transition to renewable sources and reduction of dependence on external factors.

IDENTIFICATION AND ANALYSIS OF KEY NARRATIVES AND DISINFORMATION:

In the public space of Serbia, various narratives about energy security are present, often used to shape public opinion in accordance with political, economic, or geopolitical interests. Disinformation in this area can have serious consequences for the understanding of energy policy, decision-making, and the perception of international actors. The most common narratives can be divided into several main categories, according to different criteria: geopolitical ("Russia is Serbia's only reliable energy partner"), economic ("Renewable sources are unprofitable and unreliable"), and socio-populist ("Electricity and gas must remain cheap at all costs").

According to the period and specific context of creation, they can be classified into several time-thematic units:

- the sale of the Serbian Oil Industry to the Russian Gazpromneft ("Serbian economy depends on NIS, Russian ownership in the company is unquestionable, and the change of ownership is pointless");
- the issue of energy diversification ("Russian gas is irreplaceable – diversification is impossible");

the question of sanctions against the Russian Federation due to aggression against Ukraine ("In the event of sanctions on gas, an apocalypse would ensue");

- the issue of nuclear energy as a foundation for the long-term sustainability of energy production and balance ("The best candidate for Serbia's strategic partner is Rosatom"),
- the issue of the green agenda ("The green agenda is a coercion by the EU and the USA").

In the media space of Serbia, topics related to energy security are primarily addressed by specialized energy magazines and portals aimed at the professional public and the business community. On the other hand, mainstream media cover these topics periodically, depending on the political significance and current relevance of the issue, often in a superficial and politically biased manner. An analysis from the Cenzolovka website regarding the coverage of Russian-Serbian relations by Serbian print media highlights the one-sidedness, superficiality, and lack of factual accuracy.

"What is immediately noticeable when analyzing the content of the domestic daily press is the superficiality in approach and reporting. This is also the case when covering Russia and Serbian-Russian relations, where there is no deeper analysis or critical reflection, and for the most part, only official statements from politicians are conveyed, accompanied by the creation of sensational headlines and stories." The research indicates that none of the analyzed texts on Serbian-Russian relations is negative toward Russia, while only 10% are neutral, and the rest are positive. At the same time, the European Union does not appear in a positive context at all.

The sale of the Oil Industry of Serbia (NIS) to the Russian company Gazprom Neft and the planned construction of the South Stream pipeline were significant events that attracted considerable attention from Serbian media. Media reports provided various perspectives on these topics, highlighting potential benefits as well as expressing critical views.

In January 2008, the Government of Serbia and Russian Gazprom signed an agreement for the sale of 51% of NIS shares for 400 million euros, with Gazprom committing to invest an additional 500 million euros by 2012. This agreement was part of a broader energy arrangement that also included the construction of the South Stream pipeline through Serbia. The media generally emphasized the strategic importance of this agreement for Serbia, stating that the sale of NIS and the construction of South Stream would strengthen the country's energy security and position it as a key transit route for Russian gas to Europe. It was also highlighted that these investments would contribute to the modernization of energy infrastructure and the creation of new jobs.

However, there were also critical opinions. Some analysts and media outlets argued that NIS was sold for a price lower than its market value, raising doubts about the favorable terms of the agreement for Serbia. Questions were also raised regarding the transparency of the negotiations and the potential political motives behind the agreement. For example, in an analysis published on the NSPM.rs portal, the question was posed whether the privatization of NIS was a detrimental deal for Serbia.

The basic matrix of the complex system of disinformation and manipulative content was comprised of the central narrative of Russia's irreplaceability and reliability as an energy partner and dominant supplier of key energy resources to Serbia. In cases where it was necessary to rationalize economically unviable actions by Serbian authorities, geopolitical arguments were invoked, such as Russia's veto in the UN Security Council regarding Kosovo's independence (even though this issue was never voted on by this body), as well as false promises like the construction of the South Stream gas pipeline, which was supposed to compensate Serbia for losses from the basic transaction of selling the national oil company through tax revenue.

Examples of those who led in creating and disseminating messages from this narrative include energy experts and specialized journalists such as Jelica Putnjiković, editor of the specialized energy portal Energija Balkana. This portal organizes a large number of professional conferences on energy, and Putnjiković has been promoted and established as a credible guest in key media on the topic of Serbia's energy security, particularly by Radio Television of Serbia, the national public service media. All of this happens despite the fact—rarely mentioned during her public appearances—that she is directly connected to the Russian Federation through the state agency Sputnik, where she hosts a show called Energy of Sputnik on their website.

At the time of the sale of NIS, Putnjiković was at the forefront of shaping public opinion in favor of the sale under extremely unfavorable conditions for Serbia. In her numerous appearances, she presented the sale of NIS and the promise of building the South Stream gas pipeline as one of the most important infrastructure projects for the entire region[2]. Putnjiković gained a particularly prominent role 16 years later when the dominant topic became the sanctions imposed by the U.S. on Gazprom Neft and NIS as a company that is predominantly owned by Russia. Pointing out that Russian ownership in NIS is unquestionable and that any change in this ownership is pointless, Putnjiković stated that "the entire Serbian economy would be affected by the

2 https://balkans.aljazeera.net/videos/2012/12/7/jelica-putnikovic-o-juznom-toku

imposition of sanctions on the Oil Industry of Serbia," and added that "the best alternative would be for Serbia to explain to the Americans that NIS is a company that is very important for the functioning of the Serbian economy and that by imposing these sanctions, they would effectively be sanctioning the entire Serbian economy[3]."

The so-called deal of the century continued to be praised by the Public Service, asserting that the cost of 450 kilometers of the "South Stream" pipeline through Serbia would be 700 million euros, and that Russia promised the pipeline would be completed before the competing EU project named "Nabucco." Pro-Russian portal Nova srpska politička misao "explained" why it is (after all) good for Serbia that Gazprom bought NIS. In an article signed by the little-known author Aleksandar Kostić, it is claimed that NIS is constantly under attack in public, which is intensified by negative campaigns, such as the thesis that we "gave the company to the Russians."

"In this regard, it is interesting to note that although Insider and others indirectly claim that the deal with the Russians is an obstacle to Serbia's European integration, this is absolutely not true. The truth is quite the opposite; the official policy of NIS has been to support Serbia's European integration, and due to business projects in Romania, Bulgaria, and Hungary, NIS collaborates with institutions of the European Union".[4] The text does not hide the geopolitical motives behind this deal, stating that the sale of NIS brings Russia's influence into the region through the front door.

However, despite grand promises, the construction of the "South Stream" project failed, and Russian state media targeted at the Serbian audience announced that Serbia had punished itself in the case of this gas pipeline by adhering to EU rules as a candidate country[5].

There were also significant critical voices regarding the harmfulness of the deal, but typically on less frequented portals and without the opportunity for these arguments to be heard in mainstream media. For example, in 2011, an analysis titled "Serbia and Gazprom – From Milošević to Today" was published on the portal republika.co.rs, which pointed out that the entire deal was shrouded in a veil of non-transparency and that the energy sector had been placed in the service of the political interests of Gazprom's lobbyists.[6]

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3 https://www.euronews.rs/biznis/biznis-vesti/149959/putnikovic-celokupna-srpska-privreda-bi-bila-pogodena-uvodenjem-sankcija-naftnoj-industrije-srbije/vest

4 http://www.nspm.rs/ekonomska-politika/zasto-je-za-srbiju-ipak-dobro-sto-je-gasprom-kupio-nis.html?alphabet=l#yvComment93468

5 https://lat.sputnikportal.rs/20150218/255868.html

6 http://www.republika.co.rs/494-495/20.html

When it became clear that the promises of building the "South Stream" pipeline would not materialize, the government established a working group aimed at investigating the detrimental aspects of the entire deal. While officials from the then-government were convinced that the investigation into the privatization of NIS would not jeopardize relations with Russia, former president and the main protagonist of the sale of the national oil company to Russia, Boris Tadić, immediately warned that even the mere opening of an investigation could jeopardize relations with official Moscow.[7]

In an analysis titled "Gas and Other Geopolitical Games: The Energy Agreement between Serbia and Russia - What We Wanted and What We Got After 16 Years," published in 2024 by the weekly NIN, energy expert Miloš Zdravković pointed out that Serbia is in search of new gas suppliers, that an investment for the construction of an interconnector between Serbia and Bulgaria has been initiated, and that an agreement between Srbijagas and Azerbaijan's state oil company Socar stipulates that up to 400 million cubic meters of gas are to arrive in Serbia by the end of 2024, which is only enough for about 40 days of consumption in Serbia.

"Not only is Serbia seeking new sources for gas purchases, but so is the EU. Europe has partially financed the Serbian section of the interconnector between Serbia and Bulgaria in order to facilitate the import of liquefied natural gas via Greece, specifically Alexandroupolis, where a terminal is being constructed".[8]

Regarding the depth of Gazprom's involvement in all social aspects in Serbia, which partially explains the Russian geopolitical influence in the region, the editorial office of BBC in Serbian wrote in March 2022, shortly after the beginning of the Russian aggression against Ukraine, in the article 'Gazprom in Serbia - from oil and gas to sports, Guča, and Exit.' The BBC pointed out two roles of Gazprom in Serbia, from being the main trader of oil and gas to a major sponsor in sports and culture"[9].

In an interview with the same media outlet, the then outgoing Minister of Energy Zorana Mihajlović admitted that Serbia had practically handed over its oil and gas industry to Russia, while simultaneously pointing out that "the interests of Russian lobbies were stronger" when choosing the source of gas in Serbia. "We practically handed over both the oil and gas industries to

7 https://novibeogradafera2.blogspot.com/2015/05/poklanjamo-nis-za-kosovo.html

8 https://www.nin.rs/ekonomija/vesti/43568/energetski-sporazum-srbije-i-rusije-sta-smo-zeleli-a-sta-smo-posle-16-godina-dobili

9 https://www.bbc.com/serbian/lat/srbija-60647346

the Russian Federation back in 2008—I think that was a mistake, and this crisis has only shown how much," said Mihajlović[10].

NIS revived attention a full decade later when Serbian President Aleksandar Vučić announced in December 2024 that the U.S. would impose sanctions on Gazprom Neft and NIS due to the majority Russian ownership. This activated an entire mechanism for defending Russian interests through manipulative directed campaigns that once again highlighted the inevitability of Serbia's dependence on Russian energy resources.

Among the main narratives that were promoted through Serbian media in this regard, several stand out:

Concern about possible sanctions and their impact on the Serbian economy. The President of Serbia, Aleksandar Vučić, stated that the U.S. would impose "full, complete sanctions against the Oil Industry of Serbia due to Russian ownership." This statement raised public concern about the potential negative impact on the Serbian economy. Media outlets connected to Russian lobbying groups and official structures immediately took on the role of interpreting the unfavorable events, the possibility of which had previously been persistently denied. The Russian state media Sputnik published an article titled "U.S. Sanctions Against NIS: A Threat with Many Unknowns," stating that the primary target of the sanctions would actually be the Serbian economy, a thesis that Jelica Putnjiković reiterated in her public appearances for various media outlets. In addition to this claim, Putnjiković presented another reassuring statement in the media, asserting that despite the sanctions and NIS remaining under Russian ownership, "Prices will not skyrocket; there will be heating."[11]. That there will be no problems, nor bankruptcy, was also reported by Večernje novosti in an article titled "There Will Be No Bankruptcy, There Are More Possible Solutions," published on February 25, 2025..[12]

After the initial shock, a second line of defense was relatively quickly activated in the form of a narrative denying the announcement of sanctions by U.S. officials. This was bolstered by the diplomatically restrained statement from the U.S. Ambassador to Serbia, Christopher Hill, who stated that there was no announcement regarding the imposition of sanctions against NIS, expressing concern about Russian ownership of the only refinery in Serbia. He also emphasized that sanctions should not harm Serbia.[13]

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10 https://www.bbc.com/serbian/lat/srbija-61609387

11 https://www.rts.rs/lat/vesti/ekonomija/5603308/nis-sankcije-amerika-rusija-srbija-gorivo-energija-cene-dizel.html

12 https://www.novosti.rs/ekonomija/vesti/1464161/nece-biti-stecaja-ima-vise-mogucih-resenja-vasingtona-jos-nema-odgovora-zahtev-naftne-kompanije-srbije-odlaganju-sankcija

13 https://www.politika.rs/sr/clanak/650481/kristofer-hil-ne-mogu-da-potvrdim-da-ce-amerika-uvesti-sankcije-nis-u-ne-bi-smele-da-naskode-srbiji

One line of manipulative, primarily politically motivated narratives was the interpretation of sanctions as pressure on Serbia to impose sanctions on Russia. Thus, Aleksandar Vulin, the Deputy Prime Minister of the Government of Serbia, stated that any potential sanctions against NIS would be an attempt to force Serbia to impose sanctions on Russia, which would represent pressure on the country's independent policy.[14]

Furthermore, there were great hopes in the media regarding international reactions and attempts at mediation, which represented another narrative that downplayed the seriousness of the newly emerging situation. Media reported on the efforts of international actors to mediate in the situation, such as Croatian Prime Minister Andrej Plenković, who expressed the need to find a sustainable solution to avoid sanctions that could affect Serbia and the Croatian company Janaf. Hungary also offered its assistance to Serbia, taking on the obligation to communicate with the U.S. administration regarding requests to postpone the implementation of sanctions.

Since the sale of NIS, through the annexation of Crimea in 2014, and especially since the onset of full-scale Russian aggression against Ukraine in 2022, a key topic in the area of energy security has been the possibility of diversifying supply sources and reducing Serbia's dependence on energy supplies from Russia, which was subjected to an increasingly stringent regime of international sanctions. During this period, Serbian media predominantly reported on the country's energy security and partnership with Russia through several key narratives.

The first and fundamental narrative was that Russian gas is irreplaceable, and diversification is impossible. Riding this wave, the media and numerous interlocutors convinced the public in Serbia and the region of the futility of European, and therefore Serbian, attempts at diversification. In accordance with the imposed narrative, the importance of strategic partnership with Russia was emphasized. Many media outlets highlighted Russia as Serbia's key strategic partner, particularly in the field of energy. These reports stressed the importance of cooperation with Russia for the country's energy security, including stable supplies of gas and oil. For example, Serbian President Aleksandar Vučić noted in 2017 during a meeting with the Deputy Prime Minister of the Russian Federation, Dmitry Rogozin, that Russia is one of Serbia's strategic economic and foreign trade partners, and that it is of great importance

14 https://www.politika.rs/sr/clanak/650307/vulin-sad-sankcijama-nis-u-zele-da-nas-nateraju-da-uvedemo-sankcije-rusiji?utm_source=chatgpt.com

for Serbia to continue to regularly exchange information with Russia and coordinate activities in international organizations regarding Kosovo.[15]

At the same time, the media often reported excessively and positively on the joint projects between Serbia and Russia, exaggerating their benefits for the Serbian side. For example, in 2014, a Memorandum of Understanding on energy efficiency, energy savings, and renewable energy sources was signed between Serbia and Russia, which was presented as a step toward improving the country's energy efficiency, even though nearly a decade later no results from the implementation of these projects are known or recorded.

In November 2018, the media published propagandistic praises regarding the contract for the expansion of the underground gas storage "Banatski Dvor." In this context, the Serbian edition of Sputnik provided guidance to other media, which typically followed it. The article "Strategic Project: Russia's Aid for Serbia's Energy Security," published on November 13, 2018, stated: "Although the information that the intergovernmental gas transit agreement between Russia and Ukraine expires in 2019 sounds like something very far from us, the citizens of Serbia who froze during the energy sanctions imposed by the international community in the 1990s know that it is extremely important for Serbia." This statement combines two narratives – portraying Russia as a reliable partner and protector of Serbia and the hostile West as having a long history of encroachments on the vital interests of Serbia and the Serbian people.[16]

In the same spirit, this continued in the following year, 2019, when Sputnik once again provided an impetus to the media with the article "Russia Secures Serbia's Energy Security," which discusses the gas agreement with Russia and an investment of 1.4 billion euros in Serbian infrastructure (gas pipeline for the distribution of Russian gas) that will "ensure energy security and significantly strengthen Serbia's energy position," as stated by Sputnik's interlocutor Jelica Putnjiković.[17]

At that time, there was a large number of seemingly neutral or moderately positive tones toward Russian energy interests in the media. By and large, they reported on Russian energy interests in the region without critical reflection, often repeating the views of Russian officials or company

15 https://www.danas.rs/vesti/politika/vucic-rusija-je-strateski-partner-srbije/?utm_source=chatgpt.com

16 https://lat.sputnikportal.rs/20181113/Srbija-Rusija-gas-skladiste-izgradnja-1117811772.html

17 https://lat.sputnikportal.rs/20190119/Rusija-Srbija-energetika-gas-1118561665.html

representatives. Such reports frequently emphasized the importance of Russian energy projects for regional stability and development.

The rhetoric significantly intensified after the onset of the open aggression of Russia against Ukraine. Although the EU did not impose sanctions on Russian gas exports, Serbian media insisted on themes of apocalyptic scenarios in the event of such measures being imposed by Brussels. They noted that in Europe "it will soon come to a situation where not only citizens but also entrepreneurs will rebel, seeking to import the cheapest gas," or that a complete withdrawal of Europe from Russian energy resources would represent "some kind of apocalyptic scenario."

One of the leading narratives was the glorification of Russia's position, which allegedly could dictate unilateral terms to Europe and Serbia, such as, for example, the decision to pay in rubles, a measure that has never been practically implemented. The list of unfriendly states created by Russian President Vladimir Putin, for which he set higher gas prices, was used in Serbia as a threatening argument against the decision to impose sanctions on the Russian Federation due to its aggression against Ukraine. In this case, the argument was repeated that the imposition of gas sanctions would lead to an apocalypse, but it was also emphasized that any attempt at diversification is a geopolitical project of Europe, not an economic and security project in the interest of Serbia.

During that period, headlines like "Putin Ordered: Unfriendly Countries Will Pay for Gas in Rubles" dominated"[18], "Czech Expert: Almost All EU Countries Are Violating the Ban on Importing Russian Energy Resources"[19], as well as "Novak: Europe Has No Substitute for Russian Gas," which conveys a statement by Alexander Novak, the Deputy Prime Minister of Russia, for the television channel "Russia 1," saying that "Europe will not succeed in finding a substitute for Russian gas in the next five years.".[20]

In the same vein was the statement from the director of Srbijagas, Dušan Bajatović, known for his pro-Russian views, that an apocalypse would occur in the event of sanctions against Russia on gas exports. "The hysteria created in Europe and the U.S. has multiple goals. Look at that hatred – Russian students are being expelled, private property is being seized... When

18 https://lat.sputnikportal.rs/20220323/putin-nalozio-rusija-prevodi-placanje-za-gas-u-evropi-u-rublje--1135740567.html

19 https://lat.sputnikportal.rs/20230124/ceski-ekspert-gotovo-sve-zemlje-eu-narusavaju-zabranu-uvoza-ruskih-energenata-1149840303.html

20 https://lat.sputnikportal.rs/20220324/novak-evropa-nema-cime-da-zameni-ruski-gas-1135759504.html

such hysteria is created, you can make whatever decision you want. You can make illogical political decisions and justify them to your population with hatred towards some country," Bajatović stated[21].

On the topic of paying for gas in rubles, the media insisted even when it became clear that this decision was practically unfeasible and when even the Russian leadership allowed for a wide range of exceptions. "Like it or not, Europe will have to pay for gas in rubles," analyzed Sputnik, emphasizing that Europe "will have to pay for gas in rubles, which could lead to the strengthening of the national currency and the Russian economy as a whole. On the other hand, if Europeans refuse to pay for Russian gas in rubles, it could provoke internal economic and social problems in EU countries, Russian experts have stated." Besides the assertion that Russian gas has no alternative, the article also contained a message for Serbia: "We have heard that the leadership of Serbia has expressed concern... But if you listened carefully to Putin, he stated that the transition to rubles applies to countries that are unfriendly to Russia, meaning those that have imposed sanctions on Russia".[22]

Although Russia demanded payment for gas in rubles, European buyers continued to pay for gas in euros or dollars through various mechanisms, while Russian banks converted these payments into rubles. However, recent sanctions and changes in Russian regulations have further complicated these arrangements, leading to adjustments in payment methods to comply with both European regulations and Russian demands, which is far from the assertion that Russia is in a position to impose its terms on European buyers.

The glorification and exaggeration of Russia's significance in the energy supply of Europe and Serbia reached almost mythological proportions, as evidenced by an authored text from pro-Russian influence agent Aleksandar Đurđev, president of the minor party Srpska liga, but omnipresent in progovernment media. In his article titled "The Partnership between Serbia and Russia in Energy and Oil - Older than Many Alliances and States," Đurđev raises a question and provides quite suggestive and politically colored answers: "Let's look at the current energy picture of Serbia. Our country fulfills its oil needs in two ways - from domestic production (about 20%) and through imports (about 80%). We import the most oil from Iraq (over 60%), then from Russia (over 20%), followed by Kazakhstan (about 10%) and Norway (about

21 https://lat.sputnikportal.rs/20220324/bajatovic-kad-bi-eu-uvela-sankcije-na-ruski-gas-dogodila-bi-se-apokalipsa-video-1135710517.html

22 https://lat.sputnikportal.rs/20220324/htela-ne-htela-evropa-ce-morati-da-placa-gas-u-rubljama-1135783002.html

3%). When it comes to gas, our country gets about 90% of the gas it consumes from Russia via the Turkish Stream. The justified question arises - can our country forego an energy partner like Russia, the most important for gas imports (and irreplaceable) and the second most important for oil imports (also hard to replace)? The answer is more than clear - of course it cannot, unless it wants to heed the malicious parts of the collective West and deal a fatal blow to its economy".[23]

The First Deputy Prime Minister and leader of the Socialists, Ivica Dačić, hardly missed an opportunity to demonstrate his strong commitment to strengthening energy cooperation with Russia.[24]

In the article on the portal standard.rs titled "The Energy War between Russia and the EU – Serbia Caught Between Two Fires," the author Anica Telesković states: "If Serbia were to impose sanctions on Russia, paying for gas at market prices would be a significant blow to the budget. The price of gas on the market has risen by up to 500 percent in one year."[25] Similar apocalyptic assessments are made for EU countries: "FINANCIAL CONDITIONS HAVE DETERIORATED: Inflation in the Eurozone has soared to record high levels," noting that financial conditions are rapidly worsening, and some countries are facing price increases of over 20%,[26] Although all relevant analyses have shown that energy prices have had little to no impact on European inflation caused by the effects of the coronavirus crisis.

Europe is often portrayed as unreliable and lacking independence in decision-making, while Serbia's collaboration on EU energy projects is viewed as sterile and useless. In this spirit are the messages from the article "Putin: Germany Lacks Sovereignty, the Whole World is Laughing at Some of Its Officials" dated November 29, 2023.[27] and "Serbia is Getting New Gas Infrastructure to Bulgaria, but There is No Gas" from February 2, 2022, in which it is stated that this is an insistence from Brussels on a geopolitical rather than an economic energy project.[28]

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23 https://pink.rs/politika/571701/aleksandar-durdev-partnerstvo-srbije-i-rusije-u-energetici-i-nafti-starije-od-mnogih-saveza-i-drzava

24 https://www.danas.rs/vesti/politika/dacic-za-jacanje-saradnje-u-oblasti-energetike-sa-rusijom/

25 https://standard.rs/2022/05/25/energetski-rat-rusije-i-eu-srbija-izmedju-dve-vatre/

26 https://www.novosti.rs/ekonomija/vesti/1168476/inflacija-evropa-evrozona-italija-francuska-nemacka-energetska-kriza

27 https://lat.sputnikportal.rs/20231129/putin-nemackoj-nedostaje-suverenitet-ceo-svet-se-smeje-nekim-njenim-zvanicnicima-1164419984.html

28 https://lat.sputnikportal.rs/20220202/srbija-dobija-novu-gasnu-infrastrukturu-do-bugarske-ali-gasa---nema-1133917696.html

In Serbian media, there is also a manipulative spectrum of demonization of the West, especially the United States, which are blamed for a wide range of "wrongdoings" attributed to them. In the article "Britain is Responsible, but What About America?", the B92 website shares a text stating: "The USA benefits the most from the explosions on the 'Nord Stream 1' and 'Nord Stream 2' pipelines, but Britain was also involved".[29] On the other hand, Novosti states: "EVERYONE WILL KNOW WHO BLEW UP NORD STREAM: Russia will raise the issue of terrorist attacks in which Britain was involved," in an article sourced from the news agency Tanjug dated October 29, 2022.[30]

On the same wave, narratives are being promoted—namely, that the U.S. has a significant influence on the EU's energy policy, which is a victim of imposed American interests; that the U.S. wants to replace Russia in the European gas market with significantly higher prices; and that Americans are offering Europe something it doesn't have - their "cheaper and better gas" compared to Russian gas. Under the title "Russian Echo in Serbian Media," the NGO Crta pointed out on November 13, 2022, that energy and the energy crisis are key points where disinformation related to the war in Ukraine converges. "Many domestic media outlets, including Informer, Novosti, and Pink, seized on a striking example of debunked Russian propaganda and published that in Switzerland, it is possible to report neighbors who overheat their apartments and receive a reward of 200 euros, while those guilty of excessive energy consumption could end up in prison. The media did not shy away from publishing conspiracy theories, such as the one claiming that Britain and the U.S. were responsible for the sabotage and explosions of the Nord Stream 1 and 2 pipelines, which were reported by B92, Mondo, and Novosti. An identical claim was simultaneously recorded in Russian media."The recurring story that EU sanctions have a boomerang effect and that they harm Europe more than Russia has been repeated numerous times by Serbian daily newspapers, including Kurir and Večernje novosti. This unfounded message can also be connected to Russian media, as noted in the EuvsDisinfo database[31].

In the media space, narratives suggest that the United States (U.S.) has a significant influence on the energy policy of the European Union (EU), and that the EU is, in this context, subordinate to the interests of Washington.

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29 https://www.b92.net/o/info/vesti/index?yyyy=2022&mm=11&dd=03&nav_category=78&nav_id=2237091

30 https://www.novosti.rs/planeta/svet/1167902/marija-zaharova-velika-britanija-odgovornost-teroristicki-napad

31 https://www.istinomer.rs/analize/ruski-odjek-u-srpskim-medijima/?utm_source=chatgpt.com

These narratives often emphasize that the U.S. is using its position to increase the export of its liquefied natural gas (LNG) to Europe, thereby reducing the EU's dependence on Russian gas, but at higher prices. Articles such as "American Gas for Europe — Marketing Trick or Trial Balloon" published on April 23, 2016, reflect this perspective[32], and "American Liquefied Gas — Just on Paper," which states that "where the price of something is even a third lower than the competition, it is clear that there is no economy there. Pure politics. Just like with American gas for Poland. The only problem is that Warsaw has mostly seen that gas on paper"[33]. In the same vein, articles such as "Biden's Promise Leaked: American Liquefied Gas for Europe - Only a Spoonful" follow.[34], as well as the article "Analyses in the EU: Americans Now Main Suppliers of Gas and Oil to Europe, But Prices Are Very High," published on the "Danas" portal, which highlights that American companies have become the main suppliers of gas and oil to Europe, but at significantly higher prices. It also states that American political influence on the European continent has increased, especially in the context of military protection for Europe due to the war in Ukraine. This report suggests that the war in Ukraine has enriched America, which has become the world's leading exporter of energy resources and weapons.[35]

Although affirmative texts were dominant, there were also media outlets that provided critical analyses of the energy partnership with Russia. These media raised questions about Serbia's excessive dependence on Russian energy resources and the possible consequences of such a policy on the country's long-term energy security. For instance, some analysts highlighted the risks of over-reliance on Russian gas and oil and the need for diversification of energy sources to reduce the country's energy vulnerability. For example, portals like "Danas" and "Vreme" occasionally published analyses that questioned the economic and political aspects of energy dependence on Russia, pointing to the potential risks of such an orientation.

Critical reflections were also present in academic papers that did not have significant visibility in the broader public but represent an exceptionally high-quality basis for further research and study. The article "Serbia-Russia Relations: Warm – Lukewarm – Cool" published by the weekly Novi magazin

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32 https://lat.sputnikportal.rs/20160423/sad-evropa-gas-marketing-probni-balon-1105100857.html

33 https://lat.sputnikportal.rs/20181018/sad-gas-poljska--1117531558.html

34 https://lat.sputnikportal.rs/20220826/iscurilo-bajdenovo-obecanje-americki-tecni-gas-za-evropu---samo-na-kasicicu-1141653363.html

35 https://www.danas.rs/svet/analize-u-eu-amerikanci-sad-glavni-isporucioci-gasa-i-nafte-evropi-ali-cene-jako-visoke/?utm_source=chatgpt.com

showed that the relationship between Serbia and Russia is not as bright and favorable as it is often portrayed in the pro-Russian segment of the public. A significant moment was the aftermath of Russian President Vladimir Putin's visit to Serbia in 2014, after which, two weeks later, the true message arrived – Gazprom decreased gas supplies to Serbia, allegedly due to unpaid debts for gas from 2000," the text states, adding: "The beginning of a new relationship between Serbia and Russia dates back to 2007, when, in light of the certainty of the unilateral declaration of independence by Kosovo, Russia appeared in Serbia's political discourse as a desirable partner, presented as a party offering solutions to some political as well as economic challenges. This new era of mutual relations resulted in the Energy Agreement of 2008, seen as the 'price' of Russian support for Serbia".[36]

The analysis "ENERGY COLLAPSE BEFORE THE WAR IN UKRAINE," which media consumers could not see in mainstream media in Serbia, was published by the Helsinki Committee for Human Rights. The extensive study highlights the growing deficit and expenditures of Serbia for Russian energy resources, which amounted to €1,516.9 million in 2021 and skyrocketed to €3,920.1 million in 2022, representing 44 percent of Serbia's total trade deficit with foreign countries! The study also points out that while some linked the sudden increase in energy prices solely to the sanctions of the "collective West" against Russia ("forgetting" the Russian war in Ukraine), others focused exclusively on the poor management of public energy companies, while a third group increasingly avoided energy topics and continued to loudly discuss the "reintegration of Kosovo" and the omnipotence of Russian secret missiles in some new global power arrangement.[37]

On the other hand, the media that led in publishing affirmative articles are primarily close to the authorities and pro-government tabloids that have almost exclusively published positive pieces about cooperation with Russia, extolling joint projects and highlighting the benefits of the partnership. These media often conveyed statements from officials without critical reflection, creating an image of Russia as a reliable partner and a key support for Serbia's energy security.

This approach to reporting has contributed to the formation of public opinion that views Russia as Serbia's key partner, while the West is often perceived through a negative lens and in a negative context.

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36 https://novimagazin.rs/iz-nedeljnika-nm/309694-odnosi-srbija-rusija-toplo---mlako---prohladno

37 https://www.helsinki.org.rs/serbian/doc/izvestaj%202022.pdf, str. 211

KEY MANIPULATIVE TECHNIQUES:

According to the dominant narrative and value-political orientation, it is possible to identify the following groups of media and manipulative techniques used in the marketing of political messages:

1. Pro-Russian media – shaping pro-Russian narratives

Media in Serbia that are often perceived as pro-Russian are those that consistently promote narratives supporting Russian interests, justify Russian foreign policy, criticize the West (EU, USA, NATO), and disseminate views aligned with Russian geopolitical objectives. This includes topics such as energy dependence on Russia, negative portrayals of the West, support for the Russian invasion of Ukraine, anti-NATO sentiment, and conspiracy theories regarding global events. These media outlets have a significant influence on shaping public opinion in Serbia, where there is a traditionally positive relationship with Russia, which is also reflected in the country's energy security. Pro-Russian media in Serbia use various manipulative techniques to promote Russian interests in energy. An analysis of the content of published articles on the topic of Serbia's energy security identified the following main manipulation techniques: Demonization of the West – the EU and the US are portrayed as unreliable partners who want to weaken Serbia through energy dependence on them:

- Idealization of Russian Partnership – Russia is portrayed as Serbia's only sincere ally, offering the "most favorable" energy arrangements.
- Conspiracy Theories – Claims are frequently circulated that "globalists" or "geopolitical elites" want Serbia to be left without gas and electricity;
- Sensationalism and Fear – Headlines such as "The European Union is Preparing an Energy Collapse for Serbia!" or "The West is Driving Us into Energy Disaster" are designed to provoke panic and negative sentiments towards Serbia's western partners. Considering that EU membership is a strategic orientation for Serbia, it is clear that such headlines aim to provoke long-term consequences and influences on Serbia's strategic decisions and public orientation.

The most common narratives spread by pro-Russian oriented media are:

- "Russia is Serbia's only reliable energy partner," which relies on claims that the West manipulates energy prices, while Russia offers stable and friendly conditions. At the same time, the fact that Serbia is energy-dependent on Russian gas is completely ignored, which carries risks in crisis situations.

- "The West is blackmailing us with the green transition," in which the EU's demands for reducing coal usage are portrayed as attempts at economic destabilization of Serbia. It is also omitted that decarbonization is a global process and that countries that ignore it lose access to foreign investments.

- "Renewable sources are unreliable and expensive," with the obvious aim of postponing the energy transition and continuing reliance on Russian energy resources and fossil fuels. In reality, many countries are reducing costs by transitioning to RES and increasing energy efficiency.

2. Prozapadni mediji

On the other hand, pro-Western oriented media promote EU integration and energy diversification, but sometimes they use biased and one-sided methods and approaches in their reporting. They focus on the following topics:

- Corruption in the Energy Sector – scandals and issues with state energy companies are highlighted, but sometimes claims are exaggerated.
- Emphasizing Dependence on Russia – it is often portrayed as greater than it is, ignoring Serbia's long-term plans and efforts made regarding diversification.
- Promotion of the Green Transition as the Sole Solution – without enough discussion about the challenges it poses in Serbia (lack of investment, the need for a gradual transition). However, often due to the need to confront the authorities, local initiatives opposing the construction of mini-hydropower plants or lithium mining are supported, which leads to inconsistency in editorial policy;
- Selective Comparison with the West – where it is emphasized how EU countries have reduced their dependence on Russian gas, but without analyzing the investments they have made, which Serbia still lacks.

In this group of media, there are also dominant narratives:

- "Serbia must reduce its dependence on Russian gas," which highlights the risks of relying on a single supplier, which is accurate, but sometimes ignores the real costs and challenges of energy diversification.

- "Renewable energy sources are the only future for Serbia," which promotes the energy agenda of interest groups and lobbies without sufficient analysis of the real infrastructural and financial challenges of the transition.

- "EPS is in crisis due to poor management, not global factors," where corruption is rightly emphasized as a significant problem within EPS, but the fact that global energy shocks have further worsened the situation is overlooked.

Although they are less present, Chinese media (CGTN, China Daily, Global Times) also operate in Serbia, promoting Chinese investments, which predominantly consist of loans and credits that Serbia repays, as essential for the future of Serbian energy.

In addition to traditional media, social networks and alternative information channels play a key role in spreading disinformation, with varying ranges and frequencies of impact.:

- Telegram and YouTube– are often used to spread pro-Russian conspiracy theories about the energy crisis;
- Twitter and Facebook – posts from pro-Western media about the energy transition are often subjects of manipulation and negative campaigns;
- Influencers and Analysts – certain energy "experts" on social media disseminate biased information depending on their political connections and preferences..

What characterizes the state of this spectrum of modern media is the lack of organization and regulation, along with a much greater presence of unverified information, fake news, and disinformation. What is concerning regarding social media is that, despite the increasing unreliability, the percentage of the population primarily obtaining information through social media is experiencing significant and consistent growth.

RECOMMENDATIONS FOR THE FIGHT AGAINST DISINFORMATION IN THE FIELD OF ENERGY SECURITY

Disinformation in the field of energy security can seriously jeopardize the process of making rational political decisions, create false perceptions about the country's energy policy, and provoke unnecessary polarization of the public. Therefore, it is crucial to develop strategies that will enable citizens to recognize manipulation, and for the media and institutions to ensure accurate and objective information. A necessary condition for the creation and implementation of all measures is the existence of political will and consensus among key political and social actors.

The first and most important measure is the systematic and continuous work on enhancing media and energy literacy, thereby strengthening citizens' resilience to negative and manipulative media influences. The goal of these measures is to develop citizens' ability to recognize manipulations in energy reporting—to distinguish reliable sources from propaganda, to identify manipulative techniques (clickbait headlines, selective presentation of facts, excessive dramatization, and the use of emotional language), and to differentiate political agendas from expert analyses, especially regarding the

spread of geopolitical narratives. Ultimately, the goal of education must focus on fostering critical thinking among citizens through school programs, public debates, and campaigns on energy literacy to ensure that the public gains a better understanding of energy policy and resilience against propaganda.

The second important measure is the development of fact-checking platforms, their methodologies, and media accountability. This aspect is achieved through systematic support for independent fact-checking initiatives, improved regulation of media reporting on energy, integrating energy experts into media reporting, and sanctioning the spread of false information.

The third important segment is the joint role and cooperation between the state and the civil sector. In creating a policy to combat disinformation without undermining media freedom, key steps include enhancing transparency in the operations of state institutions, promoting independent journalism, strengthening digital literacy through the education system, and maintaining continuous two-way cooperation and communication with the civil sector.

Finally, an important aspect of combating fake news and hybrid threats is international cooperation, which involves adopting best practices in combating energy disinformation, learning from the experiences of other countries, collaborating with international organizations, regional coordination in the fight against disinformation, and engaging social media platforms that can be key partners in the fight against the dissemination of false information about energy through online channels.

The fight against disinformation in the field of energy security requires a multidisciplinary approach that includes education, responsible journalism, regulatory measures, and international cooperation. The key challenge is to develop effective mechanisms to combat manipulation without jeopardizing media freedom and expression. By strengthening media and energy literacy, supporting fact-checking, and improving state and international coordination, the influence of false narratives can be reduced and objective information on key energy issues can be ensured for citizens.

CONCLUSION

The analysis of disinformation surrounding Serbia's energy security has shown that this topic is highly politicized and often subject to manipulation in public discourse. Media narratives about energy dependence, foreign influences, renewable energy sources, and geopolitical pressures shape citizens' perceptions and affect decision-making at both the individual and state levels.

Pro-Russian and pro-Western media create opposing narratives, with some emphasizing the reliability of Russian supplies and the alleged unsustainability of the green transition, while others highlight the need for

diversification of energy sources and alignment with European standards. Additionally, various interest and political groups, along with bots, trolls, and lobbyists, use media and social networks as powerful tools for spreading propaganda, often without any verified facts. The presence of disinformation in the energy sector carries serious consequences for public policy and the long-term strategy of Serbia's energy stability. Therefore, it is essential to invest efforts into implementing measures for effective combat against this negative social phenomenon. Moreover, the exchange of best practices in the fight against disinformation on both domestic and international levels can help reduce the negative impact of manipulative content and facilitate informed and sustainable energy policies. Energy security in Serbia is not just a technical issue – it has become a battleground for disinformation, propaganda, and political manipulation, which long-term affects key decision-making for the country's future. Disinformation regarding energy security in Serbia often aims to create geopolitical tensions, economic uncertainties, and resistance to reforms. Strengthening media literacy and objective reporting is crucial to protecting the public from manipulation and enabling informed decisions about the future of energy policy. The fight against disinformation in the energy sector is not only a matter of media responsibility but also a key factor in national security, economic development, and Serbia's international position, which is why it requires significantly greater societal attention.

Energy as a Means of Russian Hybrid Influence in the Balkans

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In recent years, the expressions "hybrid warfare," "hybrid influences," or "conflicts" have become more frequently heard. This term, which is relatively new, was popularized by political scientist Mark Galeotti[1] shortly after the Russian invasion of Ukraine in 2014. Even though this term is relatively new, the methods employed by those who utilize hybrid techniques have long been known. Propaganda, disinformation, economic pressures, and political pressures constitute a range of methods through which one state can influence the politics and society of another nation.

According to the author of this text, hybrid warfare can be defined as "the use of all available means against an adversary, to the extent that it does not provoke an open armed response." This means that hybrid methods involve pressures on a society in order to compel it to conform or to pursue policies aligned with the interests of the state that is implementing hybrid methods, utilizing various types of tools. Among the most recognized methods are propaganda and misinformation, aimed at ensuring that the targeted society adopts a public narrative that aligns with the nation employing hybrid means, along with economic, political, and a variety of other pressures. In recent years, or rather decades, one of the most significant forms of hybrid pressure has emerged through energy and the energy dependency of specific states.

It is also important to note that hybrid methods represent a "long game," yielding effects over an extended period of time. Achieving the desired effects requires time and persistence, as well as a high degree of adaptability to changes in the political and social situation in the targeted state. The very fact that hybrid means operating up to a certain threshold is crucial; if that threshold is crossed, public opinion in the targeted state can turn against the

1 'Hybrid War' and 'Little Green Men': How It Works, and How It Doesn't https://www.e-ir.info/2015/04/16/hybrid-war-and-little-green-men-how-it-works-and-how-it-doesnt/MARKGALEOTTI, APR162015/

employing state and its methods. Hybrid pressures can escalate, gaining influence, but when it is observed that public sentiment begins to react negatively, they are tempered, and the pressure is eased, until public opinion stabilizes, at which point the pressure can resume. For these reasons, it is essential in hybrid conflicts to monitor public opinion and the attitudes of the establishment to avoid provoking anger or a response, while adjusting pressures to "push" the targeted state in the desired direction over the long term.

With this in mind, when discussing energy as a method of hybrid conflict—or the spread of influence over another state and its policies—the Russian Federation has set the standards over recent decades. Emerging from the Cold War in a weakened state, with a relatively large population yet still smaller than that of France or Germany, and an economy that remains relatively small by global standards (about eight times smaller than that of the EU and nearly twelve times smaller than that of the United States[2]) Russia had limited options for how to expand its influence beyond its borders. Not only through military means, but also with resources abundant prior to its conflicts with the West—namely, energy.

In terms of natural gas reserves, Russia ranks first in the world. With proven reserves of 1,668,228,000 million cubic feet, Russia possesses 24.3 percent of the world's natural gas supplies[3]. In terms of natural gas production, Russia ranks second, following the United States.

When discussing oil, Russia is also near the top, but not as convincingly. In terms of proven oil reserves, Russia occupies the eighth position, holding about 4.8 percent of the world's oil reserves[4]. In terms of oil production, with approximately 10.75 million tons per day[5], Russia ranks third, following the United States and Saudi Arabia.

Beyond financial benefits, this also provided Russia with substantial political leverage. It was able to influence European politics. As early as the 1970s, with Willy Brandt's ascent to the chancellorship of the Federal Republic of Germany, the policy of Ostpolitik was initiated, facilitating economic ties between Germany and the then USSR, now Russia. This integration primarily occurred through oil and gas pipelines that supplied affordable energy to Europe's most powerful economy.

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2 Top 15 Countries by GDP in 2024
https://globalpeoservices.com/top-15-countries-by-gdp-in-2024/

3 Natural Gas Reserves by Country
https://www.worldometers.info/gas/gas-reserves-by-country/

4 Russia Oil https://www.worldometers.info/oil/russia-oil/#oil-reserves

5 What countries are the top producers and consumers of oil?
https://www.eia.gov/tools/faqs/faq.php?id=709&t=6

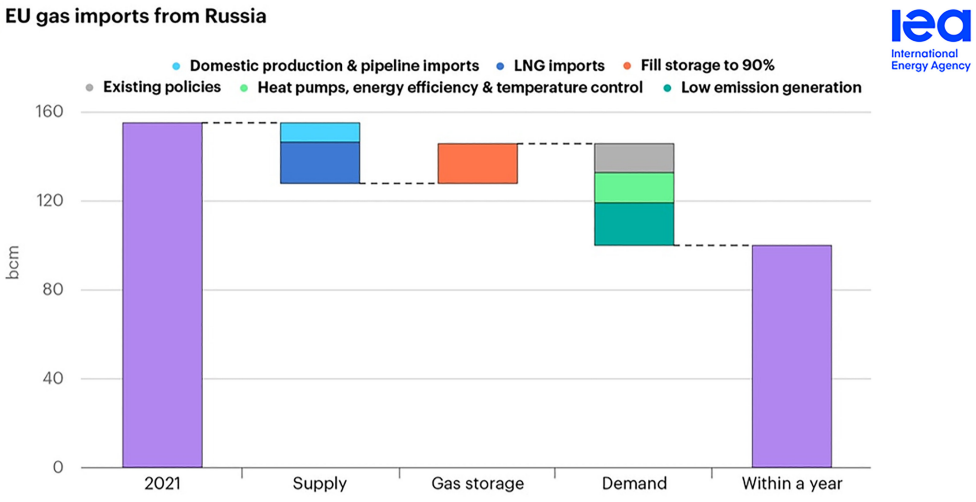
This trend continued after the collapse of the USSR and the end of the Cold War, aiming to provide Europe with cheap Russian energy while simultaneously integrating Russia and its elites into the Western system through significant business deals and investments, not only within Russia but also in Western capitals and resorts frequented by Russian elites, thereby linking the two systems to prevent potential conflicts. This strategy has proven to be a significant miscalculation.

With the construction of Nord Stream 1 and the near completion of Nord Stream 2, Germany has primarily become dependent on affordable Russian gas, which has greatly benefited its economy. However, this dependency has also made Germany vulnerable, a fact noted in the Kremlin. This was one of the reasons behind the decision to invade Ukraine in 2022, as it was believed that due to the deep dependency of much of Europe on Russian energy resources—particularly in the economic and industrial systems of Europe, especially Germany—there would be minimal resistance to the Russian invasion and occupation of Ukraine.

This constituted an even greater error and miscalculation on the part of the Kremlin. The "pitcher has broken," and it seems unlikely, if not nearly impossible, that Europe will revert to its previous dependency on cheap Russian energy in the future. While it is possible that Europe may purchase Russian energy in the years to come, it will never again allow such dependency as it did prior to the Ukraine war and the chaos that ensued.

Over the years, energy has become a potent weapon for Russia in its relations with Europe. Prior to the invasion of Ukraine, estimates indicated that Russia supplied the EU with about 90 percent of its oil and approximately 40 percent of the natural gas that was imported from this country. The Russian state giant Gazprom led this influx of Russian energy into countries primarily in Central and Eastern Europe.

The extent of Europe's dependency on Russian gas is depicted in the chart below.



The almost complete dependence of parts of Europe, particularly Germany, on Russian energy resources was likely one of the arguments for Vladimir Putin to initiate the invasion of Ukraine in 2022. It was probably believed that due to this energy dependency, European nations would be unwilling to engage in conflict with the Russian Federation, and that the occupation of Ukraine would proceed relatively smoothly. However, that plan completely backfired; the invasion of Ukraine and its swift conquest failed, and Europe embarked on a long and somewhat arduous process of weaning itself off cheap Russian energy and quickly transitioning to renewable energy sources, primarily solar and wind.

The Balkan Gambit and Soft Power

Where do the Balkans currently stand in this global battle of titans? The influence of Russia in the Balkans is no novelty; it is a historical paradigm. Over decades and centuries, this influence has been maintained in various ways.

For Russia, since the mid-19th century, the Balkans have held strategic significance due to the waterways in the southeastern peninsula that allowed hostile forces access to the Black Sea, as well as passage through the Balkans to the Middle East and the Caucasus among competing European powers. Even then, Russia, like other European powers, employed methods that contemporary political science would describe as hybrid actions. As one of the most powerful states in the 19th and much of the 20th century, Russia capitalized on the desires of the Balkan peoples to liberate themselves from the Ottoman Empire or Austro-Hungarian authority. Given that the majority of the Balkans' population is of Orthodox faith or Slavic descent, Russia leveraged what is today referred to as soft power, or the power of attraction. Russia positioned itself as the protector of the Slavic and Orthodox peoples of the Balkans, not solely for emotional reasons, but primarily for practical ones, seeking to harness the emotions and aspirations of the Balkan peoples for their liberation or unification to expand its influence in this part of Europe. This approach proved highly successful during the transition from the 19th to the 20th century, particularly by developing close and purportedly protective relationships with Serbia and Bulgaria—both Orthodox and Slavic nations that were also of significant geostrategic importance to Russia at that time. Bulgaria, due to its proximity to the Bosporus and Dardanelles, was strategically vital for Russia's security, while Serbia sought to liberate its compatriots from Ottoman rule and stood at the borders of

Austro-Hungary, the other major rival to the Russian Empire in the Balkans. Greece also occasionally attracted Russian policy focus, albeit to a lesser extent, as its geographical position along the Mediterranean Sea placed it under substantial British influence, whose navy effectively guaranteed its security and sovereignty.

With the fall of the Russian Empire and the emergence of Bolshevik Russia, this influence in the Balkans diminished until the end of World War II. Subsequently, the entire region, with the exception of Greece, fell under the sphere of interest and control of the USSR. However, Yugoslavia, under communist control and Josip Broz Tito, managed to extricate itself from Moscow's grasp in 1948 and follow a relatively independent policy from the Kremlin.

This does not imply that Soviet Russia abandoned its ambitions for regaining control over Yugoslavia. It attempted various methods now classified as hybrid warfare. Through all forms of pressure—from military threats to economic, intelligence, subversive, and propaganda tactics—Russia created instability within the country for years, if not decades, to ultimately compel it to comply with its will. Yet, these efforts failed.

All of this illustrates that the Balkans have always been a focal point of Russian interest and part of its national security plans. This focus continued even after the end of the Cold War and the dissolution of the Soviet Union, leading to the formation of the Russian Federation.

Although significantly weakened after the Cold War, Russia did not relinquish its ambitions. Its strategy has shifted from aggressive territorial expansion to retaining influence over peripheral states, especially around the Black Sea—geostrategic points that have long been vulnerable for Russia. It seeks to keep these states under its influence rather than direct control and to prevent them from breaking away and integrating into the West, specifically the Euro-Atlantic system embodied by NATO and the European Union.

Russia has pursued this goal through various means: militarily, as seen in Georgia, Moldova, and now Ukraine, while simultaneously using traditional methods of subversion, propaganda, and political or economic pressure—what we now refer to as hybrid methods.

This strategy has also been applied in the Balkans. Recognizing that it can no longer project its power over great distances and lacks the necessary strength and wealth to influence neighboring states towards its desired direction, Russia has primarily focused on expanding its energy power as a part of its hybrid influence strategy, making local elites dependent on it. This

has been accomplished not only through energy acquisition—by purchasing energy companies—but also corruptly, leveraging revenues from these companies to bribe local elites.

NIS is (Not) Ours

On a chilly January day in 2008, an intriguing group convened in Moscow. The guests of Russian President Vladimir Putin were Serbian President Boris Tadić and Serbian Prime Minister Vojislav Koštunica. The purpose of the visit was to finalize what some considered a historic agreement—heralded as the deal of the century, while for others it was catastrophic, yet undoubtedly strategic—between Serbia and Russia. This energy agreement between the two countries was meant to solidify the strong ties between them while also effectively placing Serbian energy resources in Russian hands and thereby influencing Serbian politics as well[6].

The agreement included the sale of a majority stake in the Serbian Oil Industry (NIS), which was practically a monopoly in the refinement and sale of petroleum derivatives in the country, to the Russian energy giant Gazprom, as well as the construction of the Russian South Stream pipeline through Serbia (a project that later failed disastrously), and the establishment of a gas storage facility in Banat. Meanwhile, the Serbian mineral rent remained at a minimal three percent, far below global standards in this sector.

In return, Serbia expected support from Russia on the global political stage, particularly in the United Nations Security Council regarding the issues of Kosovo and Metohija. The energy agreement, heavily imbued with political implications, meant that Serbia handed over its energy sector to Russia, rendering itself dependent on Russia and its political stance regarding a pressing political issue within Serbia.

The signing of the energy agreement between Serbia and Russia was accompanied by anecdotal events highlighting the eagerness of the Serbian political elite to display their closeness to Russia. It was a matter of public opinion and electoral votes, which the Russian side clearly relished observing. Tadić and Koštunica vied for the opportunity to sit in the chair next to Putin, prompting protocol officials to resolve the situation. Although this might seem comical, it was far from trivial. Those who sat next to Putin were perceived by the Serbian public as being closer to him and thus enjoying his support.

6 Western Balkans must pursue more competitive energy sectors, By Matthew Bryza
https://www.atlanticcouncil.org/in-depth-research-reports/issue-brief/western-balkans-must-pursue-more-competitive-energy-sectors/

This dynamic allowed the Russian Federation to demonstrate its power in Serbia, throughout the Balkans, and to facilitate the subsequent expansion of its influence in this region of the world. The sale of NIS was ultimately signed by the newly elected President of the Russian Federation Dmitry Medvedev (who had famously swapped roles with Putin, who became Prime Minister) and Serbian President Boris Tadić at the end of that same year.

In that same year, Serbia also signed the Stabilization and Association Agreement with the European Union, thereby economically binding itself to the EU while becoming fully dependent on the Kremlin in one of its most critical sectors: energy. This dependency extended into the political realm, particularly concerning the issues of Kosovo. It is noteworthy that the Serbian oil industry (NIS), through taxes and excise duties, was responsible for nearly a quarter of the budget of the Republic of Serbia.

Serbia is not the only country where Russia has expanded its influence in this manner—not through hard power, but through soft power and hybrid methods. As noted, the countries of the Western Balkans have traditionally been a focal point of Russian interests, given their significant historical ties. The soft power of Russia in the Balkans should never be underestimated.

It is precisely these hybrid methods, characterized by a quiet and gradual entry of Russia through economic, energy, cultural, and political agreements with Balkan elites, that allowed it to establish a new foothold in what many at the time did not perceive as conflict with the Western world—a conflict that culminated in the war in Ukraine.

Thus, the primary means for Russia in the Western Balkans, in addition to historical sentiment and shared Slavic or Orthodox connections, has been energy. This energy has allowed Russia to establish itself as a soft power or hybrid instrument, thereby drawing certain Balkan countries, primarily Serbia and Bosnia and Herzegovina, into its sphere of interest. This influence has ensured that no significant decisions can be made without Russian approval.

The continuous presence of energy companies from the Russian Federation in Serbia, North Macedonia, Bosnia and Herzegovina, Bulgaria, or Greece—primarily through Russian oil giants Gazprom and Lukoil—has enabled the Kremlin to expand its influence in this region, affecting its economy and politics, and influencing or, more accurately, impeding the formulation of strategic political decisions.

The Balkan section of the TurkStream gas pipeline operates at nearly full capacity, transporting over 12 billion cubic meters of Russian gas annually.

The main buyer of this gas is Budapest, as well as the surrounding countries through which it passes.

Thus, TurkStream supplied Serbia with approximately 2 billion cubic meters per year, sufficient to meet Serbia's needs. However, the honeymoon period of unobstructed Russian influence through energy, utilizing hybrid methods on certain Balkan countries, especially Serbia, appears to be coming to an end. This shift began following the onset of the invasion of Ukraine and the subsequent sanctions from the West.

In fact, Gazprom soon sold part of its shares in NIS Serbia after the invasion, reducing its ownership from 56% to 50%, while six percent was sold to a company registered in the Netherlands, believed to be linked to Gazprom.

On the other hand, in Bulgaria, another traditionally pro-Russian state where Russophilia has perhaps been most pronounced over the decades, Russian influence through energy has become increasingly significant and pervasive over the years. Despite being a member of the European Union and NATO, the political situation in Bulgaria has enabled the continued dependence on Russian energy resources, in defiance of warnings from the EU and the United States.

Bulgaria is also known, as some experts indicate, for dubious connections and dealings between government officials and their Russian counterparts, particularly in the energy sector[7]. A former Bulgarian Minister of Energy, for instance, found himself under sanctions imposed by the United States under the so-called Magnitsky Act, which targets politicians around the world suspected of corruption, particularly those with corrupt dealings with Russia, according to the U.S. Department of the Treasury. He, along with two other Bulgarian officials, was suspected of a corrupt contract with Russian gas suppliers and the supplier of nuclear fuel regarding the Kozloduy nuclear power plant.

Until the war in Ukraine, the most recent conflict, Russia maintained a significant presence in Bulgaria, particularly in the energy sector. The Neftochim refinery in Burgas, located on the Black Sea, remains under Russian ownership. Although there have been reports that the Bulgarian government might nationalize the refinery in order to remove Russian capital, this has yet to materialize. Some companies and entities from the former Soviet bloc

7 Western Balkans must pursue more competitive energy sectors, By Matthew Bryza
https://www.atlanticcouncil.org/in-depth-research-reports/issue-brief/western-balkans-must-pursue-more-competitive-energy-sectors/

have expressed interest in purchasing the refinery[8]. Whether this would indeed result in the exit of Russian capital from Bulgaria's only refinery, or merely involve retaining control through intermediaries, remains to be seen.

Following the onset of the war in Ukraine in 2022, Russian influence in Bulgaria's gas sector grew, aided by a confidential agreement made in January 2023 between the gas monopolies of Bulgaria and Turkey[9]. This agreement effectively allowed Russian gas to continue flowing into Bulgaria through the interconnection between Turkey and Bulgaria. According to the agreement, Bulgaria is required to accept any gas coming from the Turkish pipeline without any obligation to disclose the gas's origin. There are significant doubts regarding whether this gas will indeed be Russian and whether this arrangement will perpetuate Bulgaria's dependence on Russian energy while also allowing Russian gas to flow "through the back door" into Europe. This situation has led the Bulgarian side to become the subject of an investigation by the European Commission due to suspicions of violating EU regulations.

Perhaps nowhere has Russian influence on energy been as comprehensive and strong as in Bosnia and Herzegovina. This country is divided into two entities and remains entrapped by misunderstandings—often exacerbated from external sources—between the entities of Republika Srpska and the Federation of Bosnia and Herzegovina, decades after the signing of the Dayton Agreement and peace accords. It is a nation still far from membership in the European Union and NATO.

In 2007, a Russian company acquired the entire oil industry of Republika Srpska, including the oil refinery in Brod, the oil refinery in Modriča, and the distribution company "Petrol." Thus, the entire oil sector in this part of Bosnia and Herzegovina transitioned into Russian ownership.

The other entity, the Federation of Bosnia and Herzegovina, has also not remained immune to Russian influence in the energy sector. Through intermediaries—companies from other EU states—one Russian company gained ownership of Energopetrol, the main distributor of petroleum products in this part of the country. However, after a few years, this Russian company exited from its stake in the parent company.

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8 Kazakh company reportedly bidding for Bulgaria's only refinery https://www.euractiv.com/section/politics/news/kazakh-company-reportedly-bidding-for-bulgarias-only-refinery/

9 Western Balkans must pursue more competitive energy sectors, By Matthew Bryza https://www.atlanticcouncil.org/in-depth-research-reports/issue-brief/western-balkans-must-pursue-more-competitive-energy-sectors/

Regardless, Bosnia and Herzegovina, particularly Republika Srpska, remain closely tied to Russia, not only due to potential supplies of oil and gas—though these have been significantly disrupted following the European Commission's decisions in response to Russia's invasion of Ukraine—but also because these sectors constitute some of the most valuable economic segments in the country, financing numerous projects, social events, political parties, and public figures. All of this serves to further Russia's influence in this society over the long term, which is not a great secret.

Although Russian investments in the region have increased over the years across various sectors, the overall Russian influence in the economy of the Western Balkans has diminished and stagnated, according to research findings from the European Parliament[10]. This stagnation was evident even in 2014 after the initial Russian invasion of Ukraine and the annexation of Crimea, along with the two eastern regions of Ukraine. The previous boom in Russian investments, particularly in the energy sector in the Western Balkans, has started to slow. The era of idealistic relations between the West and Russia, and consequently with the Balkans, has ended. Caution now characterizes perceptions of Russian intentions for the future, which culminated in the full invasion of Ukraine in 2022.

Although many experts, particularly from Central and Eastern Europe, warned as early as the late 1990s and early 2000s that Russian expansion in energy was essentially a means to extend their power through hybrid methods—creating dependency in other countries and engaging in corrupt dealings with their elites—such warnings were not taken seriously at the time. It was believed that Russia had little else to offer the global market except cheap energy resources, and this was seen as a way for Russia to bind itself to the West, specifically Europe, through the construction of pipelines. This arrangement allowed Russians and their elites to generate wealth while providing Western countries, particularly Germany, with affordable energy, thereby integrating Russia into the Western system.

The pinnacle of German policy, "Wandel durch Handel," or "change through trade"—which succeeded brilliantly in the case of Germany and France, and later with the Soviet Union—proved to be a complete miscalculation in the context of Putin's Russia. During this time, as politicians were enamored by the notion that allowing the flow of Russian energy into Europe and

10 Russia's influence in the Western Balkan https://www.europarl.europa.eu/RegData/etudes/ATAG/2022/733523/EPRS_ATA(2022)733523_EN.pdf

the Balkans would lead to a transformation in Russia, the reality was quite different. Instead of changing, Russia diligently nurtured its hybrid methods through corruption, acquisition, propaganda, and disinformation across Western Europe and even the United States. The stark realization came with the abrupt awakening caused by the Russian invasion of Ukraine in 2022.

By that time, Russia had deeply embedded itself and expanded its influence throughout the Western Balkans. According to relevant assessments, Russian energy influence is most substantial in Serbia, North Macedonia, and Bosnia and Herzegovina, where (prior to the most recent war in Ukraine) they supplied nearly 100 percent of the gas market[11]. Russia's dominance in the gas sector, and significantly in the oil sector, within the Western Balkans was unequivocal and highly pronounced.

In the absence of sanctions on Russian gas, particularly at the beginning of the war in Ukraine—and largely up to the present—the Balkans remained a significant market for Russian energy companies. However, primarily due to opposition from the United States, the governments of the region had to exercise greater caution and refrain from publicly demonstrating partnerships and desires for cooperation with Russia, which, it must be reiterated, has used energy as a hybrid instrument to exert influence over regional countries. This was particularly evident in regard to the Nord Stream 2 pipeline in the Baltic Sea[12], where American opposition to the significant influx of Russian energy into Europe, and consequently into the Western Balkans, emerged from fears that it could become a powerful political weapon in the hands of the Kremlin—a possibility that became evident during the energy crisis that followed the invasion of Ukraine, albeit less dramatically than many had anticipated.

Russia's objective, now clearly discernible, has always been to prevent, where possible, the rapprochement of the countries of the Western Balkans with the European Union and especially NATO. Energy resources were merely one of the tools employed in this hybrid strategy. In many countries, this approach was unsuccessful, as in Bulgaria, Romania, Montenegro, North Macedonia, Albania, and Croatia, but in some, such as Serbia and Bosnia and

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11 Russia's influence in the Western Balkan https://www.europarl.europa.eu/RegData/etudes/ATAG/2022/733523/EPRS_ATA(2022)733523_EN.pdf

12 Between the Baltic and the Balkans, the new geopolitics of gas, Gilles Lepesant https://www.robert-schuman.eu/en/european-issues/775-between-the-baltic-and-the-balkans-the-new-geopolitics-of-gas

Herzegovina, hybrid methods proved to be quite effective due to the political challenges faced by these states.

In countries where the political landscape was unequivocally pro-Western, the aforementioned hybrid methods were utilized to cultivate dependencies on Russian energy to slow integration processes, financing those who opposed the rapprochement of these Western Balkan countries with the Western world. Nevertheless, the invasion executed by Vladimir Putin against Ukraine significantly diminished the advantages that Russia once held in those countries, particularly in the energy sector[13]. Russia has historically aimed to use hybrid, or asymmetrical and low-cost approaches to hinder the Balkan countries' integration into Western institutions—an endeavor that had been quite successful for years[14]. Through the expansion of influence and the so-called soft power in various forms—supporting associations sympathetic to Russian interests, sports clubs, schools, media, veterans' groups—alongside energy manipulation, Russia's power in the Balkan states grew, maintaining an atmosphere of uncertainty. Many countries still find themselves in a state of uncertainty and ongoing political tension and societal division.

Attempts to divide Balkan nations along national or religious lines, to stall reforms, constitutes a solid model of hybrid warfare. However, it can ultimately only postpone what is inevitable: the accession of the entire region to the Western world, which will happen post-war in Ukraine and in accordance with European policies aimed at relieving Russian energy pressure and dependency. This is a policy that all Balkan countries will have to follow, willingly or unwillingly.

The war in Ukraine has compelled all of Europe, and thus the Balkan countries, to diversify their energy sources, ensuring that they do not become victims of "energy blackmail," one of the many hybrid methods of influencing other nations.

Weaning Off Russian Energy

As previously mentioned, the situation changed dramatically on February 24, 2022, when Russian troops launched an open invasion of Ukraine. The era of gas love between Europe and Russia has come to an end, and this is also true for much of the Balkans.

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13 Russia's Influence in the Balkans, James McBride
https://www.cfr.org/backgrounder/russias-influence-balkans

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The example of Germany and its issues with gas after the onset of the war, along with the sanctions imposed on Russian energy imports, made Balkan countries acutely aware of the dangers of being so "entangled" and dependent on the energy sector of another state—especially one as powerful as Russia, which has used energy resources as one of its hybrid tools to augment its power and leverage, some might even say as a means of coercion in negotiations with Western countries.

Almost all the countries in the Balkans joined the EU and US sanctions against Russia, except for Serbia. The majority of Serbian citizens, along with the government, wished to "remain neutral" and avoid damaging relations with the Russian Federation, and thus they never joined the sanctions. However, in the energy sector—which is crucial for the independence of any state—things began to change slowly.

The countries of the Balkans started to diversify their gas supplies. Serbia secured a portion of its gas needs to be sourced from Azerbaijan via a gas interconnector from Bulgaria. Additionally, a segment of gas will be supplied in the future from the port of Alexandroupolis in Greece, which has become a regional hub for liquefied natural gas (LNG).

Meanwhile, Bosnia and Herzegovina have established a physical connection to an LNG terminal on the Croatian island of Krk to further diversify its supplies. Greece has dramatically reduced its purchases of Russian gas, although not sufficiently. Bulgaria terminated its contract with Russian Gazprom for gas supplies in April 2022, but gas continues to arrive through alternative pipelines. In Bulgaria, the Neftochim refinery, operated by Russian Lukoil, has continued to rely on Russian oil, thanks to an exemption from sanctions that Bulgaria secured, although the duration of this arrangement remains uncertain, posing significant political questions in both Sofia and Brussels.

Plans are in place to soon operationalize the Ionian-Adriatic Pipeline, which will transport natural gas through Albania, Montenegro, and Bosnia and Herzegovina to Croatia. All of this is part of a broader plan to "remove" Southeast Europe, and particularly the Balkans, from Russian energy dependence, thereby dramatically reducing the political pressure that Russia exerts on these countries.

One of the primary alternatives is the Southern Corridor, which consists of the Southern Gas Corridor that runs through Azerbaijan and Georgia, which will subsequently connect to the Trans-Anatolian Pipeline (TANAP) through Turkey, and then to the Trans-Adriatic Pipeline (TAP) through Greece and

Albania, ultimately under the Adriatic Sea to Italy[15]. The Greece-Bulgaria interconnector will further link the gas from TANAP at the Greek-Turkish border to Bulgaria, which will then be interconnected with Serbia. All these are means by which, with the assistance of Brussels, Balkan countries are organizing themselves and ceasing to be exclusively reliant on Russian gas.

Perhaps the strongest energy stronghold for Russia in the Balkans remains the contested ownership of the Serbian NIS. However, following the introduction of American sanctions on NIS's operations, significant questions arise regarding the future of this effectively monopolistic entity in Serbia. Whether a circumvention solution may be found, involving shell companies to ensure NIS remains under Russian control, or whether the Serbian government will buy it or nationalize it, is one of the pressing political questions in Serbia. If Russia withdraws from NIS, its primary stronghold not only in Serbia but also in the Balkans, it will strip Russia of its last substantial advantage in the region, which could be employed as a hybrid instrument. Details regarding who NIS has financed over the years, including various public figures and organizations, and how Russia has used the funds from this company to expand its influence in Serbia—and this can also be said for all Russian companies in the Balkans and Europe—remain largely undisclosed.

Hybrid warfare is a "long game," played over an extended timeframe. The means employed are diverse and can include anything that does not lead to open-armed conflict. When armed conflict does occur, it is a sign that the elites of that country have opted for military confrontation. Energy is among the most powerful hybrid instruments that can be utilized, providing Russia with considerable advantages over the years. The pieces were remarkably arranged, but the unsuccessful Russian invasion of Ukraine—specifically the failure to seize control and establish their authority—has shattered all those years of efforts and plans in the Balkans and Europe. This situation is likely to persist for an extended period ahead.

15 Western Balkans must pursue more competitive energy sectors, By Matthew Bryza
https://www.atlanticcouncil.org/in-depth-research-reports/issue-brief/western-balkans-must-pursue-more-competitive-energy-sectors/

Energy sovereignty of serbia

Author: Mr. Saša Đogović, economist,
editor of Macroeconomic Trends

1. Electricity Balance

The electricity balance of Serbia indicates that the country experienced a growth trend in electricity production during the period from 2019 to 2023, with the exception of 2022. The decline in production that year was attributed to a significant accident in the "Kolubara" mining basin.

As a result of this accident, electricity production sharply fell, and the demand for coal imports surged dramatically.

In 2022, approximately 35.5 thousand GWh of electricity was produced, marking a decrease of 7.1% compared to the previous year. With increased coal imports in 2023, a notable improvement in electricity production dynamics was recorded, achieving a growth rate of 12.7% year-on-year. Undeniably, this high growth rate is also a consequence of the extremely low baseline for comparison from 2022.

Production of electricity and coal

	Total electrical energy, GWh	Sub-bituminous coal, brown coal and lignite, t
2019	37600.025	38880520
2020	37956.473	39673059
2021	38235.523	36417513
2022	35510.460	35129689
2023	40027.810	31937750

Source: RZS

Meanwhile, coal production has been in constant decline since 2020. In 2020, coal production peaked at nearly 39.7 million tons, which has since noticeably decreased, reaching around 31.9 million tons in 2023. Estimates suggest that in 2024, production will further decline to approximately 31.2

million tons. This indicates that Serbia had to increase coal imports in the periods following the accident to ensure regular electricity production.

This situation stems from the unprofessional, party-driven management of the Electric Power Industry of Serbia (EPS). Negative personnel selection, which promoted particular rather than general interests, led to amateurism in managing the entire EPS system and caused significant damage to the country's electricity system and to Serbia as a whole—especially amidst high market prices for electricity during the first year of the Russian invasion of Ukraine. Rather than profiting, EPS incurred losses, which also affected the state through financial bleeding due to electricity imports. In 2022, EPS recorded an operational loss of approximately €628 million, an increase of nearly 400% compared to the previous year.

After the enormous increase in imports during the year of the accident and high market electricity prices in 2022 (the first year of the Russian invasion of Ukraine), which totaled nearly €1.6 billion, the need for imports was reduced in 2023 and 2024 due to lower import prices and increased coal imports on a continuous basis. In 2023, electricity imports amounted to approximately €783 million, and in 2024, close to €651 million. Nevertheless, this import amount remains significantly higher compared to the situations in 2019 (€238.7 million) and 2020 (€168.8 million).

Export and import of electricity

	Export	Import	Index - export	Index - import
Total	682.518	650.685	53,6	83,1
Albania	1.148	384	159,6	103,4
Austria	3.504	-	264,5	-
Bosnia a and Herzegovina	34.820	154.645	40,4	101,2
Bulgaria	75.181	25.101	151,2	43,3
Switzerland	-	12.871	-	270,4
Denmark	-	65.235	-	109,5
Croatia	64.101	98.519	55,7	193,2
Hungary	89.686	79.378	40,8	107,2
Luxemburg	10.340	7.809	72,0	68,3
Montenegro	97.970	33.337	74,0	66,4
North Macedonia	118.868	54.218	85,2	68,9
Holand	-	12.157	-	783,0
Poland	-	7.099	-	-
Romania	186.900	91.510	37,5	42,4
Slovenia	-	8.420	-	33,6

Source: data RZS

In 2024, the largest volume of electricity was imported from the market of Bosnia and Herzegovina, amounting to €154.6 million, followed by imports from Croatia at €98.5 million and Romania at €91.5 million.

Despite the increase in electricity demand due to the revitalization of economic activities, the significantly higher level of imports in 2024 compared to the situation just four years prior clearly signals a lack of investment in the energy sector, as well as unresolved damage from the end of 2021 and early 2022 in the Kolubara mining basin.

In 2024, electricity exports also saw a significant decline, dropping from nearly €1.3 billion in 2023 to just €682.5 million. This decline is a consequence of poor hydrological conditions and insufficient new energy capacities.

The largest export markets for Serbia in 2024 were Romania (€186.9 million) and North Macedonia (€118.9 million).

The extent of the damage to Serbia's electricity system in 2022 is particularly evident in the explosive surge of coal and lignite imports, which increased nearly sevenfold compared to the previous year. The highlighted upward trend in coal imports continued into 2023, when approximately €376 million was allocated for this purpose, representing an increase of 132% compared to the previous year. In 2024, a decrease in coal imports was recorded, amounting to 35%, bringing the import value to around €245 million. However, this figure still exceeds the level of imports from the pre-crisis year of 2021.

Import of Brown Coal and Lignite in the Period 2021 - 2024

	2021	**2022**	**2023**	**2024**
Brown coal and lignite	23.280	162.159	376.350	245.115

Source: RZS

During 2023, when the highest imports of coal and lignite were registered, Serbia sourced these raw materials primarily from Indonesia, amounting to nearly €159 million. This represents a staggering 9.7-fold increase in coal imports compared to 2022. This data alone reflects the prolonged negative impact of the accident on the electricity balances in Serbia. The second-largest source was Bosnia and Herzegovina (€92.2 million), followed by Bulgaria (€77.6 million). Coal imports from Bulgaria also surged approximately four times compared to the figures from 2022.

Export and import of brown coal and lignite by country in 2024

-in thousands. euro-

Name	Export	Import	Index - export	Index - export
Total	660	245115	150.23	65.13
Bosnia and Herzegovina	635	89366	387.07	96.92
Czech Republic	-	9753	-	82.49
Greece	-	0	-	-
Croatia	-	3	-	-
Hungary	25	-	-	-
Indonesia	-	119971	-	75.49
India	-	0	-	-
Montenegro	-	14204	-	99.87
North Macedonia	-	10	-	0.23
Romania	-	7035	-	47.03
Türkiye	-	4772	-	274.74

Source: RZS

In 2024, the top two positions again belonged predominantly to the markets of Indonesia and Bosnia and Herzegovina, while no imports from Bulgaria were recorded.

Although there is still no data on electricity production in 2024, considering the extremely dry summer and the need for electricity imports during that period, alongside a further decline in coal production, it can be concluded that total electricity production in 2024 experienced a noticeable decline. This is also indicated by the data showing that EPS's profit fell from €958 million in 2023 to only €200 million in 2024, a decrease of nearly fivefold.

Due to electricity insecurity, the government of the Republic of Serbia has arranged an investment for the construction of a solar park in southern Serbia with a capacity of 1 gigawatt, which is expected to commence implementation this spring. It would also be significant for Serbia to initiate the investment in the Djerdap Hydroelectric Power Plant.

Undoubtedly, the existing electricity capacities and resources are not, nor will they be in the foreseeable future, sufficient to meet the needs of all consumers, especially with the development of artificial intelligence technology. Recently, only one major investment has been completed, which is Block 3 at the Kostolac Thermal Power Plant—a rather disappointing outcome. Therefore, Serbia is already lagging in strategic investments in the electricity production sector.

Serbia electricity balance in 2023

	Solar photo-voltaic energy	Wind Energy	Hydro energy	Electric energy (total)
	GWh			
Primary energy production	46.565	1067.942	13080.477	-
Export	-	-	-	5174.188
Import	-	-	-	7363.937
Stock balance	-	-	-	-
Total available energy	46.565	1067.942	13080.477	-2189.749
Total domestic consumption	46.565	1067.942	13080.477	-2189.749
Total energy supply	46.565	1067.942	13080.477	-2189.749
Expenditure for energy production	46.565	1067.942	13080.477	970.913
HPP	-	-	13080.477	-
WPP	-	1067.942	-	-
SPP	46.565	-	-	-
Reversible hydroelectric power plants	-	-	-	970.913
Energy production by transformation	-	-	-	40027.776
HPP	-	-	-	13080.477
WPP	-	-	-	1067.942
SPP	-	-	-	46.565
TPP	-	-	-	23501.801
Thermal power plants - heating plants (TE-TO)	-	-	-	1849.677
energy plants	-	-	-	481.314
Own consumption in the energy sector1	-	-	-	4004.546
HPP	-	-	-	94.303
TPP	-	-	-	2415.310
Thermal power plants - heating plants (TE-TO)	-	-	-	104.846
Energy plants	-	-	-	37.077
Heating plants	-	-	-	172.940
Oil and gas extraction	-	-	-	89.758
Refineries	-	-	-	325.533
Petrochemistry	-	-	-	-
Blast furnace	-	-	-	-
Coal mines	-	-	-	642.678
Coal processing	-	-	-	33.160
Others	-	-	-	88.941
Losses	-	-	-	4129.461
Energy available for final consumption	-	-	-	28733.107
Final consumption for non-energy purposes	-	-	-	-
Of that for the chemical industry	-	-	-	-
Final consumption for energy purposes	-	-	-	28733.107
Industry2)	-	-	-	9274.111
Construction	-	-	-	353.826
Traffic	-	-	-	394.109
Households	-	-	-	13008.212
Farming	-	-	-	367.307
Other consumers	-	-	-	5335.542
Statistical difference	-	-	-	-

1) Energy circulating in the system is also included

2) Industry, excluding the energy sector and final consumption for non-energy purposes

Source: RZS

2. Energy balance of natural gas

Serbia is import-dependent on natural gas. According to the latest available data from official statistics, total domestic consumption in 2023 was approximately 2.8 billion cubic meters (Stm³). This represents a lower level of consumption compared to 2022, when it amounted to around 2.9 billion Stm³, attributed to more favorable weather conditions.

Balance of natural gas in 2024. year

	Natural gas (000 Stm3)
Primary energy production	314934
Import	2657624
Export	-
Stock balance	-141992
Total available energy	2830566
Warehouses for international shipping	-
Total domestic consumption	2830566

Source: RZS

Natural gas imports skyrocketed in 2022, reaching €1.6 billion. This was a staggering 282.8% increase compared to the pre-war year of 2021. During that time, natural gas worth €943 million was purchased from the Russian Federation, marking an increase of 141.7% compared to the previous year. Notably, natural gas worth €670 million was sourced from Hungary. This resulted in an index greater than 1000 compared to 2021 levels. It is evident that this pertains to the purchase of Hungarian natural gas, which they had in their storage facilities that year.

Export and import of natural gas

-in thousands euro-

Godina	Export	Import
2020	496	409.386
2021	1.020	426.953
2022	8.053	1,634.366
2023	1.689	1,258.993
2024	42	993.767

Source: RZS

In 2023 and 2024, total imports decreased. In the last year observed, imports amounted to approximately €994 million. However, this figure is significantly higher than it was prior to the Russian invasion of Ukraine. In 2021, total natural gas procurement was at the level of €427 million.

The reasons for the significantly higher volumes of natural gas being imported since 2022 stem from both the creation of strategic reserves and slightly higher prices for additional gas deliveries. Additionally, the consumption of blue fuel itself is increasing. In 2020, consumption reached 2.5 billion cubic meters (Stm³), and by the end of 2023, it increased to slightly over 2.8 billion standard cubic meters. However, this largely depends on the duration and severity of winter conditions.

Traditionally, Serbia imports the majority of its natural gas from the Russian market. In 2024, nearly €774 million worth of natural gas was procured from this market, accounting for 77.9% of total gas imports from foreign markets. Additionally, approximately €185 million worth of gas was sourced from Hungary. This reflects the earlier storage of natural gas from the Russian market in Hungary's storage capacities.

Export and import of natural gas by country in 2024

-in thousands euro-

Name	Export	Import	Index - export	Index - import
Total	42	993.767	2,48	78,9
Azerbaijan	-	28.614	-	-
Bulgaria	-	6.831	-	201,6
French	-	1	-	75,2
Hungary	-	184.608	-	118,2
Montenegro	12	-	5,0	-
North Macedonia	30	-	2,3	-
Russian Federation	-	773.712	-	70,4

Source: data RZS

In 2024, for the first time, imports of natural gas from Azerbaijan appeared, amounting to a symbolic €28.6 million. Given that the interconnection with Bulgaria has been operational since the very beginning of 2024, it is realistic to expect an increase in the value of natural gas imports from the Azerbaijani market. A volume of up to 400 million cubic meters has already been contracted to be supplied by 2026.

To achieve additional serious diversification of the gas market, Serbia's strategic goal should be the construction of a gas interconnection with Romania. This would significantly reduce the energy, and consequently the political, influence of the Russian Federation on Serbia. In other words, Serbia would gain greater sovereignty in making political decisions aligned with its strategic interests.

One of the modalities for diversifying sources of natural gas procurement is liquefied natural gas (LNG). While it is more expensive, it can serve as a beneficial factor in energy diversification, particularly concerning geostrategic positioning. In 2024, Serbia imported liquefied natural gas valued at a modest €450,000, predominantly from the U.S. market, amounting to €380,000.

2. Energy balance of oil

Serbia is an import-dependent country, partly in the case of electricity, and dominantly in the case of natural gas and oil.

The oil balance for the year 2023, which is the latest available statistical data, indicates that in the structure of total oil consumption, as much as 78.8% came directly from imports.

	Crude oil (t)
Primary energy production	805872
Import	3053285
Export	-
Stock balance	17511
Total available energy	387668
Warehouses for international shipping	-
Total domestic consumption	3876668

Source: data RZS

In the period 2020-2024, the most oil was imported in the year of the beginning of the Russian aggression against Ukraine, close to 2.2 billion euros. This was as much as 91.1% more than in 2021. The main generator of such a rapid increase in imports, in addition to higher prices, is the need to create strategic reserves in turbulent geopolitical circumstances.

Import of petroleum and oil from bituminous minerals

Year	Import
2020	732.815
2021	1,138.783
2022	2,175.802
2023	1,791.770
2024	1,494.690

source: RZS

In 2023 and 2024, the value of oil imports will decrease to 1.8 billion euros and 1.5 billion euros, respectively. This is a consequence of the drop in the price of oil on the world market, as well as transferred stocks, so smaller quantities were needed for procurement.

Export and import of petroleum and bituminous oils by country in 2024

-in thousand euro-

Name	Import	Index - import
Total	1,494.690	83,4
Azerbaijan	390.584	617,5
Hungary	1.629	*
Iraq	567.490	71,8
Kazakhstan	476.965	151,1
Libia	53.078	39,0
Romania	4.499	65,7

Source: data RZS

As sanctions on the import of oil from the Russian Federation took effect in the last month of 2022, the imports of this energy resource from that country in 2023 were minimal, amounting to just €203,000. For comparison, total imports from the Russian market throughout 2022 were approximately €1 billion, representing an increase of around 3.5 times compared to 2021. In the pre-war years of 2020 and 2021, Serbia imported the most oil from Iraq, followed by the Russian market.

In 2024, with the full implementation of sanctions on oil imports from the Russian Federation, this country no longer appears as a supplier of this energy resource to Serbia. Iraq has once again become the primary source, selling oil to Serbia worth approximately €567 million, followed by Kazakhstan at €477 million. Azerbaijan ranks third, from which Serbia procured oil valued at €391 million, or about 6.1 times more than in 2023. This is directly attributable to the sanctions against the Russian market. It is possible that some of the oil from these countries may actually originate from Russia.

The current government in Serbia plans to venture into an investment project to construct an oil pipeline that would connect Serbia to the Russian Federation via Hungary, in addition to the existing JANAF pipeline built during the former Yugoslavia, which originates in Croatia. The feasibility of this project amid a process of new geostrategic realignments and a sharp

socio-political crisis within Serbia itself—upending the foundations of the current government—remains an open question.

Additionally, there are questions regarding the fate of the Oil Industry of Serbia (NIS), which is majority-owned by a Russian partner. This company is under the pressure of U.S. sanctions, which have been softened by granting a special license to operate until March 28 of this year. There is a possibility that this deadline may be further extended, as the Russian side currently has no intention of fully relinquishing its positions in NIS, which it uses to infiltrate its propaganda narratives both in Serbia and throughout the Western Balkan region. Simultaneously, the Serbian government is reluctant to confront the Kremlin directly and is not resorting to protect its vital national interests through the nationalization of NIS. For now, the resolution of this issue has been postponed thanks to the flexibility of the U.S. side, a result of lobbying efforts with the new Trump administration.

4. Waste, an unused economic and energy resource of Serbia

This chapter will focus on the environment and the potential of a green economy in Serbia as a significant reservoir for enhancing the country's gross domestic product (GDP).

It has been over three years since Serbia opened Cluster 4 within the negotiations for European Union accession, which pertains to transport policy, energy, trans-European networks, and environmental issues. This provides a basis for assessing Serbia's position in the realm of environmental protection and green economy initiatives.

The latest official statistical data pertains to the year 2023.

According to this data, Serbia generated 180.2 million tons of waste, representing an increase of 3.2% compared to 2022. Relative to the figures from 2021, this signifies an increase in waste production by nearly 2.6 times. This information indicates that there have been investments in sectors that can be classified as polluting industries. Notably, mining is one such sector. Massive investments by China's Zijin Mining in the Bor Basin have been the primary trigger for the drastic increase in waste on the Serbian market. This is corroborated by the data showing that in 2023, mining produced approximately 171 million tons of waste, reflecting a 3.7% increase compared to 2022, and an increase of nearly 2.9 times compared to 2021. In terms of waste composition, mining accounted for 94.9% of the total waste generated in 2023, compared to 84.9% in 2021.

Out of the total waste generated, 22% falls into the category of hazardous waste. In 2022, the total amount of hazardous waste was 17.1%. Thus, there is a noticeable increase in hazardous waste being produced by industrial facilities, primarily from mining. In 2023, the mining sector disposed of 76.9% of non-hazardous waste and 23.1% of hazardous waste. In 2022, hazardous waste from mining comprised 18%. The data for both 2022 and 2023 indicates a significant increase in new hazardous waste from mining, a direct consequence of new investments and more intensive mining operations.

Waste treatment in the Republic of Serbia

	2023. year, tons
Total treated	178,855.578
Reused	2,209.184
Using waste as fuel for energy production	211.181
Recycled	1,824.100
Landfill waste	173.903
Stored	176,646.393
Land disposal	176,411.233
Other methods of disposal	235.160

Source: data RZS

In 2023, out of a total of 180.2 million tons of waste generated, 178.9 million tons were treated. At first glance, this appears to be a very good result. However, a deeper analysis reveals a disheartening statistic: of the 178.9 million tons of treated waste, as much as 176.4 million tons are merely disposed of on land. Moreover, 22.4% of this waste is hazardous. Additionally, 77.6% of non-hazardous waste remains unused.

These figures glaringly highlight the urgent need for investments in ecological projects, particularly in the development of a circular economy. This initiative can especially be significant in areas such as energy, recycling, construction, and more.

For instance, the ash produced by the Electric Power Industry of Serbia can be utilized in the construction industry. Annually, approximately 7 million tons of ash is generated, for which substantial funds are expended for its maintenance, instead of transforming the ash into a source of new revenue. Only 5% of the ash is sold, while the remaining portion ends up in landfills.

Of the 2.2 million tons of treated waste that were reused, the majority—around 1.8 million tons—was sent for recycling. The proportion of treated waste used as fuel for energy production, amounting to 211 thousand tons, is 9.6%. While this represents progress, it is still insufficient compared to 2022, when it stood at a mere 4.2%.

Furthermore, the data regarding treated water significantly indicates the need for substantial investments in this domain of environmental protection. From the 101 million cubic meters of wastewater generated by industry, only 31 million cubic meters were treated in 2023.

All the aforementioned data clearly signal that there are vast resources available for the development of a circular economy and green energy. In this context, concrete projects are necessary to advance the implementation of the green agenda, particularly in the energy sector.

5. Planned Energy Projects

In the domain of oil and gas infrastructure development, the following strategic investments are highlighted:

- The connection of Serbia to the Druzhba oil pipeline via Hungary. This project would open the door for direct access and purchase of oil from the Russian market. Currently, imports of crude oil from the Russian Federation are under sanctions from the European Commission, preventing Serbia from importing via Croatia, where the pipeline has operated since the times of former Yugoslavia. Instead of Russian oil, the pipeline predominantly carries Iraqi oil.

A feasibility study for this project has been completed, covering a segment of 180 km in Hungary and 120 km in Serbia. The plan is to realize the project by 2027. The cost of the Hungarian section of the pipeline is estimated at €320 million, while the Serbian section is projected to cost €157 million. Its capacity is set at 5.5 million tons of oil. The goal of this project is to diversify sources of supply and transportation of oil. This pipeline would create conditions for the influx of Kazakh oil, not only Russian oil. Economically, the project would enable Serbia to secure more favorable oil supply conditions. However, the question remains how much this project aligns with the interests of the Kremlin itself. It is evident that the Serbian authorities perceive that by the time the pipeline is completed, there could be a political resolution regarding Ukraine, potentially leading to the lifting of, if not all, at least a substantial portion of sanctions against the Russian Federation, thus providing the pipeline with both political and economic justification. Conversely, it is challenging to justify the decision to import oil from the Russian Federation via Hungary under largely unchanged geopolitical conditions, especially when Serbia has the option to import from Iraq through Croatia. The realization of this project will largely depend on the resolution of the NIS case, specifically the modalities of normal operation for this energy company, which is

currently under Russian influence. Therefore, the question surrounding this project is more political and geopolitical than it is economic.

The implementation of this project undoubtedly serves the full interests of the Russian Federation, as the official Kremlin seeks to maintain its energy position in Serbia after Serbia's diversification of gas sources through the construction of the interconnector with Bulgaria. Plans are also in place to connect with Greece through North Macedonia and with Romania. In this manner, Serbia and the Western Balkans become subjects within the negotiation framework of great powers, namely the United States and the Russian Federation. This positioning is currently challenged for the Kremlin. On one hand, the import of oil from the Russian market has been halted, while Serbia has alternative markets functioning. On the other hand, with the construction of the Bulgarian interconnector anticipated to be operational by the autumn of 2024, conditions have been established to reduce the need for importing blue fuel from the Russian market. This gas pipeline from Azerbaijan through Bulgaria has a capacity of 1.8 billion cubic meters annually. For now, a quantity of 400 million cubic meters of gas has been contracted from Azerbaijan for 2024, with the option for these deliveries to increase.

- The governments of Serbia and North Macedonia signed a memorandum for the construction of a joint gas pipeline extending 70 km, with a capacity of 1.2 billion cubic meters. This would further connect Serbia to Greece, specifically to the port of Alexandroupolis, from which liquefied gas would depart. The Ministry of Transport, Construction, and Infrastructure has made the Spatial Plan for Special Purpose, with elements for detailed regulation of the main gas pipeline MG14 Orljane – Leskovac – Vranje – border with North Macedonia publicly available. This project is expected to receive financial support from the European Union, as it is a regional initiative aimed at further diversifying sources of energy supply.
- In addition to the already constructed and operational gas interconnection with Bulgaria, which connects Serbia to Azerbaijan, Serbia is also seriously considering the construction of a gas interconnection with Romania with a capacity of 1.6 billion cubic meters.

Currently, the national gas transportation systems of Serbia and Romania are not interconnected. However, as Romania aims to become a regional leader and one of the principal natural gas producers in Europe by 2028, it is undoubtedly in the interest of both the European Union and Serbia to

establish practical cooperation with Romania to further diversify gas supply sources and enhance the transport of blue fuel to the EU. The implementation of a major project named "Neptun Deep," related to the exploration of natural gas in the Black Sea off the coast of Romania, serves as a launchpad for Romania's clearer positioning on the energy map of the region and Europe, thereby providing Serbia with an opportunity to access blue fuel at lower costs.

The gas interconnection between Serbia and Romania would be constructed at the Mokrin – Arad location. The pipeline connecting the two countries would be 85.5 km long on the Romanian side and only 12.8 km on the Serbian side.

Thus, with minimal new investments, Serbia could secure a new gas supplier without intermediaries in transportation. The construction works on the Serbian side are expected to be completed by 2027. It is estimated that this gas pipeline will cost Serbia €12 million.

Romanian Transgaz estimates that the tender procedure for the commencement of works in Romania could begin in 2026, with completion expected by 2028. The first step has already been taken, as a Memorandum of Understanding was signed between the relevant ministries of the governments of Serbia and Romania in August of this year.

In conclusion, with the already constructed interconnector to Bulgaria and the ongoing efforts to implement plans for the construction of interconnections to North Macedonia and Romania, Serbia will definitely ensure full diversification of sources for blue energy supply. Consequently, it will become an important hub for supplying a portion of EU countries while simultaneously reducing Russian influence by eliminating gas as a lever for political coercion and manipulation of political conditions in Serbia.

Among the electrical energy projects that are planned, the following can be highlighted:

1. In mid-October 2024, representatives of the Government of Serbia, the Electric Power Industry of Serbia (EPS), and the consortium of Hyundai Engineering and UGT Renewables signed a contract for the implementation of a project to construct solar power plants in six local self-governments in Serbia (covering the territories of the cities of Zaječar and Leskovac, as well as Negotin, Bujanovac, Lebane, and Odžak). This project involves the construction of self-balancing solar power plants with large capacities, totaling at least 1,000 megawatts of installed capacity, along with battery storage systems for electricity totaling a maximum of 200 megawatts, capable of

storing at least 400 megawatt hours of electricity. Currently, planning and technical documentation are being prepared, with the commencement of construction expected at the beginning of 2026.

2. The development of the project for the construction of the Bistrica reversible hydroelectric power plant is underway. The assessment of the project and technical documentation is being conducted by the Japan International Cooperation Agency (JICA). The state plans to initiate preparatory works during 2026.

3. Discussions have been initiated with French partners regarding the construction of nuclear energy capacity. Currently, two workshops have been held on building human capacities for the development of nuclear energy and integrating the Serbian industry into the project. The plan is for the French partners, EDF and Egis, to present applicable solutions for Serbia in April, including technologies proposed for the development of nuclear energy. The options include small modular reactors or a large nuclear power plant.

4. The first phase of the revitalization of the Bajina Bašta reversible hydroelectric power plant has been completed. In March, work on the renovation of the second generator was expected to begin. The revitalization of the Bajina Bašta reversible hydroelectric power plant enhances the security of the Serbian electricity system, increases reliability, and extends the operational life of the golden reserve within the Electric Power Industry of Serbia. This single reversible hydroelectric power plant is a critical reserve during periods of increased electricity demand or during droughts.

For Serbia, the construction of the Djerdap 3 Hydroelectric Power Plant would be of great significance. However, this project could only be realized within the triangle of Belgrade – Washington – Bucharest.

Additionally, there are plans for the investment in the Buk Bijela Hydroelectric Power Plant. The foundation stone was laid back in May 2021, and since then, progress has stalled. At that time, the project was valued at around €250 million and was meant to be a joint effort between the electric utilities of the smaller entity in Bosnia and Herzegovina (Republika Srpska) and the Republic of Serbia. However, due to unresolved property relations within Bosnia and Herzegovina, particularly concerning the two entities in that country, the project remains stalled. The eventual involvement of the United States could help unlock this project, which is a shared interest for both Serbia and Bosnia and Herzegovina.

It can be concluded that Serbia does not have full energy sovereignty. This is especially true for oil and natural gas, as Serbia does not possess these

energy resources and is therefore compelled to import them. In this regard, it is crucial to proactively work on diversifying supply sources.

The problem is that Serbia does not have full sovereignty in the electricity sector either. To secure this sovereignty and thereby enhance the competitive strength of the domestic economy as a foundation for developing other economic capacities, it is essential to continuously address the obstacles to developing new investments in this energy sector. These obstacles may be political in nature, such as the political relations with Bosnia and Herzegovina or the lack of social consensus within Serbian society regarding further directions for the development of energy infrastructure in the country.