SECURITY CHALLENGES IN THE BLACK SEA: NATO, THE WIDER REGION AND THE GLOBAL ORDER

Pledging for a free and open Black Sea

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Abstract

Russia's war on Ukraine is part of a broader challenge by Russia—with support from China—to the West and the United States. On the geopolitical chessboard are two seas where the liberal rules-based order and freedom of navigation are being directly challenged: the South China Sea and the Black Sea. The latter, with entrances from the Danube and the Dardanelles, sits at the crossroads between north-west and south-eastern Europe as well as between central Asia and Europe. Maritime trade through the Black Sea is a significant proportion of European maritime trade—and pivotal for its riparian states. Grain transported through the Black Sea from Ukraine is an indispensable element of global food supplies, on which many populous countries in Africa and Asia are dependent. The Black Sea is of longstanding strategic significance to Russia and a major route for its oil exports which help fund its war on Ukraine. The Black Sea also contains considerable natural gas reserves which, once on stream, could significantly reduce Europe's residual dependency on Russian gas. The exploitation of these reserves could be at risk from disruptive Russian 'hybrid' actions; appropriate measures need to be taken by Romania and its partners to mitigate vulnerabilities. One of the intermediate objectives of Russia's war on Ukraine is the conquest of the remainder of Ukraine's Black Sea coastline. This would create another direct land border between Russia and NATO territory, in terrain along the Danube Delta that would be difficult to defend and suitable for Russian hybrid activities. As well as continuing to help Ukraine resist Russian aggression, NATO needs to take further practical steps—such as improving surveillance and air defence capabilities as well as assisting Bulgaria, Romania and Türkiye to deepen their trilateral cooperation—to enhance security in the Black Sea and ensure that it remains free and open for global trade.

Global Context

The crisis in Ukraine is neither a territorial conflict nor an attempt to restore regional balance. The question is much broader and more fundamental. We are talking about the principles on which the new world order will be based.
—Vladimir Putin.

Russia's war on Ukraine is not only a conflict between two states, triggered by Russia; it is also the most visible part of the global conflict Russia is initiating against the West. Putin publicly emphasised the wider stakes of his war on Ukraine at a meeting of the Valdai Club in October 2023: "The crisis in Ukraine is neither a territorial conflict nor an attempt to restore regional balance. The question is much broader and more fundamental. We are talking about the principles on which the new world order will

Source: XINHUA/Xie Huanchi/EPA Permanent Mission of the People's Republic of China to the UN

Figure 1. Xi Jinping and Vladimir Putin after signing a joint statement during Xi's state visit to Moscow in March 2023.

be based."[1] Russia and China have become partners in challenging the post-World War 2 liberal order and US leadership. Putin is obsessed with erasing the effects of the collapse of the Soviet Union. Although his ideal is to restore parity between Russia and the US (which now exists only in terms of its strategic nuclear arsenal), Putin recognises that Russia is far from able to confront the US alone, so China's support is vital to his approach. The "no limits" partnership between Beijing and Moscow is an asymmetrical partnership between the two states, in which Russia's economic and political dependence on China is obvious. However, Russia has the ability to leverage its advantages and capabilities, especially its broad set of "hybrid" tools, to undermine the cohesion of the West, and thus has become a useful, even indispensable, ally to China in its strategic confrontation against the US.

Russia wants not only to destroy an independent Ukraine by annexing part of its territory and imposing an obedient regime in Kyiv, but also to destroy the credibility of the US and its allies.

A Russian victory in Ukraine, even a partial one by which it *de facto* retained the 20% of Ukraine's territory which it now occupies, would mean that a country with a GDP the size of Italy's, but with a huge nuclear arsenal and substantial energy resources, had managed to prevail against the World's most powerful military and economic coalition. In these circumstances, the countries of the Global South would be reluctant to see the US and the leading Western powers as reliable allies. The altering of borders through military force would become much more common behaviour on the international stage. Several countries would see possession of nuclear weapons as the only reliable guarantee of their territorial integrity. The example of Ukraine, which had voluntarily surrendered its nuclear arsenal for security guarantees that turned out to be illusory, would weigh heavily on their future calculations. In addition, Iran and North Korea would become much more aggressive, encouraged by Russia's success.

Conversely, a Ukrainian victory, which would mean regaining a significant part of its territory, including Crimea, would spell the end of Putin's neo-imperialist dream and most likely the end of the Putin regime. It would also give China pause for thought.

On this huge geopolitical chessboard are two seas where the US and its allies are directly confronted, where freedom of navigation is being deliberately and constantly subverted through military and hybrid actions. These are the South China Sea, where the main actor is China, and the Black Sea, where the main actor is Russia. This analysis will focus on the Black Sea, which is part of the Euro-Atlantic area and where Russia's aggression is fully apparent. A comparative study of the ways in which Russia and China act could be a useful approach that LSE IDEAS and the New Strategy Center will consider for a future paper.

The Geopolitical Significance of the Black Sea

Figure 2. The Black Sea.   *Source: New Strategy Center*

Figure 3. Rail-2-Sea.
*Source:* 3SI Research Center.

The Black Sea is first and foremost about connectivity, being at the crossroads of vital routes not only for Europe but also globally. The ancient road 'from the Varangians to the Greeks' linked the Baltic area to Constantinople (now Istanbul) and the Byzantine Empire from the 9th Century, and the Via Egnatia linked Constantinople to Italy. The Silk Road, which first linked China with Europe, also passes through the Black Sea region, and today the Central Asian link, the Middle Corridor project, means connectivity with Europe via the Caspian and Black Sea. The 3 Seas Initiative[2] is geographically centred on the Black Sea, with projects such as Via Carpathia aiming to connect the Baltic to the Black Sea area and the northern Aegean by land, and a fast rail project, Rail-2-Sea[3], involving the modernisation of 3663 kilometres of railway line, aims to connect the Polish Baltic port of Gdansk with the Romanian Black Sea port of Constanta.

The Black Sea has two entrances: the Bosphorus and Dardanelles Straits from the South and the Danube from the West. Discussion of the Black Sea tends to focus heavily on the two straits, neglecting the connecting role of the Danube. The Danube connects the Black Sea with the North Sea through the 171 kilometres long Rhine-Main-Danube Canal and deserves more consideration both for trade and for military mobility.[4] The Danube played a crucial role for Ukraine's grain exports, especially in 2022 and 2023, when Russia blocked Ukraine's Black Sea ports and then left the Grain Initiative, again obstructing Ukraine's exports.

Figure 4. Middle Corridor.   *Source: Tanvir Anjum*
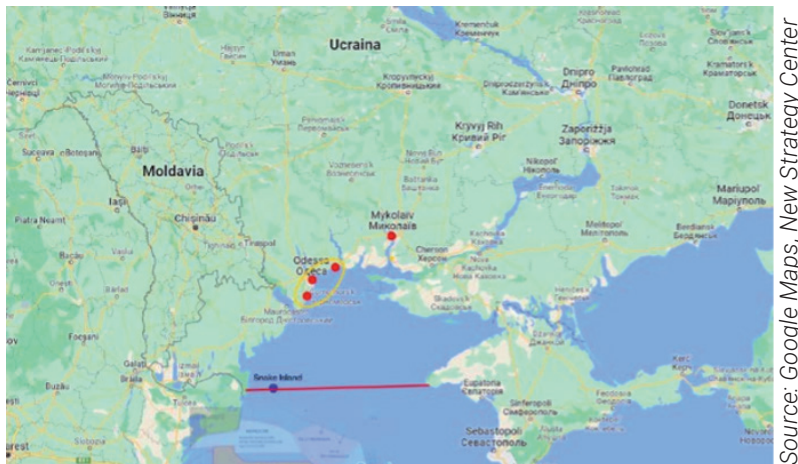
Source: Google Maps, New Strategy Center

Figure 5. Russia's naval blockade, August—September 2022.
━━━━━━━ Line of Russian naval blockade, February—September 2022.

The Black Sea and Global Trade

The Black Sea region is a significant economic artery; for example, over the 2010-2022 period, about 14.7% of European container trade passed through the Black Sea.[5] And it plays a major role in global grain supplies.[6] Littoral countries such as Russia, Ukraine, Romania, and Bulgaria play an important role in the world wheat and sunflower oil trade. In 2022, out of total global wheat exports Russia accounted for 8.02%, Ukraine 4.46%, Romania 4.29%, and Bulgaria 2.35%.[7] As the world's largest wheat importer with a share of 6.58%, representing imports worth $4.82 billion, the social stability of Egypt depends on wheat supplies from the Black Sea region. In 2022, Russia had 34.7% of the wheat export market share in Egypt, Romania 20%, Ukraine 9%, and Bulgaria 5%.[8] As for sunflower oil, the largest global exporter in 2022 was Ukraine with a market share of 32.6%, followed by Russia with 18.2%, Bulgaria with 9.3%, and Romania with 2.45%.[9]

Before the Russian invasion in 2022, 400 million people in Africa and Asia depended on cereals from Ukraine, according to UN data. As a result of the war, Ukraine's grain exports initially fell by 30%. Before the war, 10% of Ukraine's GDP came from agriculture, with 20% of Ukrainians working in the sector. Today, 20% of Ukraine's territory is no longer available for agriculture, being occupied or affected by mines. 20% of the grain delivered by the UN in various humanitarian programmes comes from Ukraine.[10] Russia has been trying to disrupt the flow of world grain trade in order to deprive Ukraine of the revenues needed to continue the war, and to create famine and instability in some countries in Africa and Asia, to blame the West and to intervene as a saviour, by delivering free quantities for political and image benefits in the Global South, but also to eliminate Ukraine as a competitor on the world grain market. This effort has been only partially successful. By July-September 2023, Ukraine's grain exports had fallen to just over 2 million tonnes

per month, compared with about 6.5 tonnes per month pre-2022. However, Ukraine's success in targeting Russian Black Sea ships and bases has allowed it to establish a new 'temporary export corridor' which hugs the western coastline. By early 2024, Ukraine was exporting over 5 million tonnes per month (5.3. million in January, 5.8 million in February, 5.2 million in March).[11]

The Black Sea and Ukraine

The economic impact on Ukraine of Russia's blockade of Ukraine's Black Sea ports was huge. In the first months after the full-scale invasion in February 2022, the loss to the Ukrainian economy averaged $170 million per day.[12] Ukraine had to move most of its maritime exports through its Danube ports, Reni and Ismail, and then through Romania's Sulina and Constanta ports. Whereas 300,000 tons of Ukrainian grain transited through Romania in March 2022, this had risen to millions of tons per month by October 2023. Ukraine and Romania have made a huge effort to
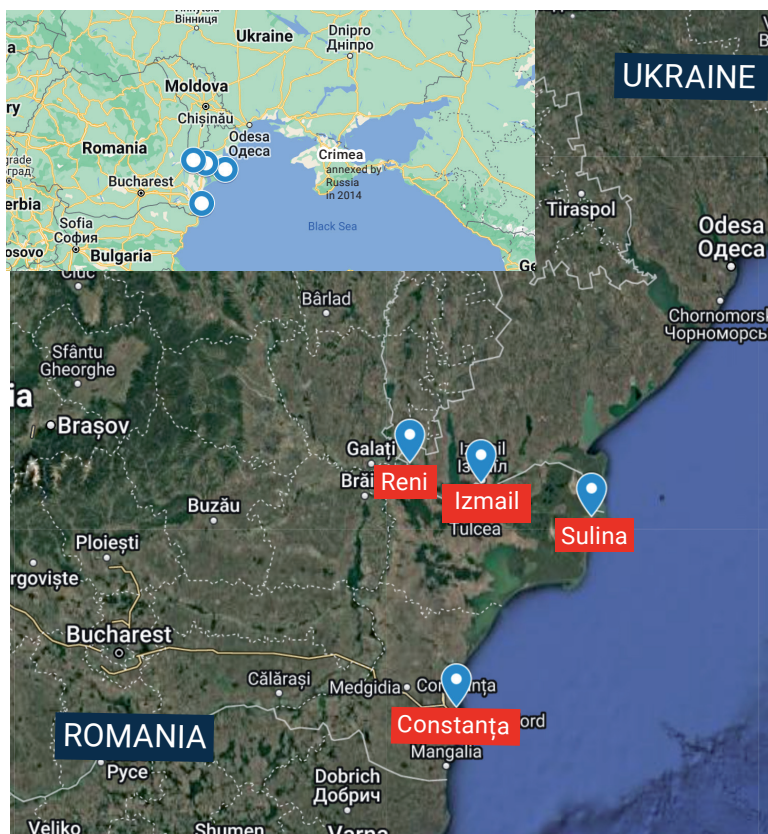

Figure 6. Romanian ports (Sulina and Constanta) and Ukrainian ports (Reni and Ismail) used by Ukraine to export grain.

Source: Google Maps with a reconstruction based on a map found in BBC news.

rapidly improve their connectivity by investing in port and logistical capacities. For example, Romania has invested over €400 million of its own funds to help Ukraine's grain exports, vital for the country's economic survival.[13]

The Black Sea is integral to Russia's plans to destroy Ukraine. Putin's major objective remains the conquest of Ukraine's entire Black Sea littoral. Without Black Sea access, Ukraine would become a continental country with much diminished strategic relevance, with its exports dependent on land links with its neighbours. Russia has proved that it has the capacity to use hybrid actions to obstruct road traffic at some border crossings with Poland and Slovakia, exploiting protests by Polish, Slovak, Hungarian, and Romanian farmers and transport operators.

The Black Sea is an important gateway for Russia's export of the oil and gas products[14] which provide the revenues for its war on Ukraine. According to the Monitoring Group of the Black Sea Institute of Strategic Studies and Black Sea News, in June 2024, 216 tankers exported oil and petroleum products from Russian Black Sea ports. They transported a total of about 13.7 million tons of cargo, including 4.1 million tons of Russian crude oil (32 tankers), 6 million tons of Kazakh CPC crude oil (44 tankers), and 3.6 million tons of Russian petroleum products (140 tankers).[15] There are two separate streams of crude oil exported from Russia's Black Sea ports: Russian crude oil, from the ports of Novorossiysk, Taman, Tuapse, the rapid transshipment in the Kerch Strait and south of it and crude oil of the Caspian Pipeline Consortium (CPC), from a special terminal in the port of Novorossiysk. The latter contains 80% Kazakh oil and 20% oil produced in Kazakhstan by the Russian Lukoil company. Even though it is transported via Russian territory, Kazakh oil is currently not subject to sanctions.[16]

According to the independent reports on the violations of the embargo on seaborne imports of Russian crude oil into EU countries, in June 2024, three violations were recorded of the EU embargo on seaborne imports of Russian **crude oil** from the Black Sea. They were involved in the delivery of crude oil to a transshipment point in the Laconian Gulf off the coasts of Greece and Malta. Shipowners from China, Türkiye, and the Marshall Islands performed these voyages. In June 2024, a total of 275,850 tons of Russian crude oil were delivered to the EU in violation of the embargo, compared
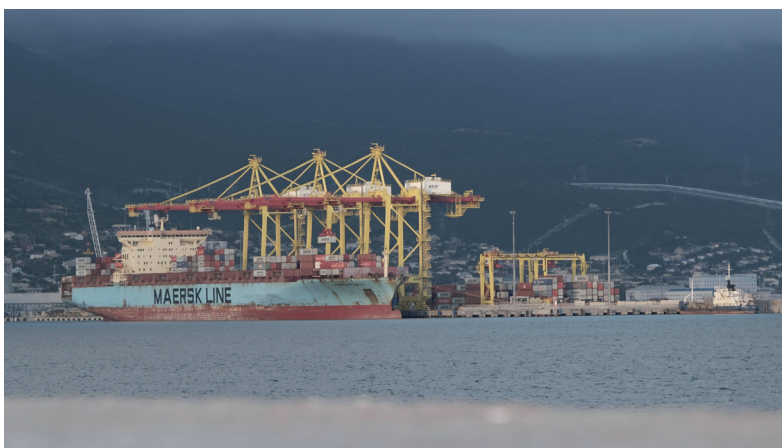
Figure 7. Novorossiysk Commercial Sea Port.
source: Елена Плыгач via Pexels

Figure 8. Admiral Feodor Ushakov.
source: Painting of Ushakov, public domaiin; Admiral Ushakov destroyer image from mil.ru under Creative Commons, referencing War History Online

with 157,327 tons in May 2024.[17] In June 2024, 14 violations were also recorded of the EU embargo on seaborne imports of **Russian petroleum products (excluding crude oil)** from the Black Sea. Of these violations, 11 involved the delivery of petroleum products to a transhipment point in the Laconian Gulf off the coasts of Greece and Malta. In June 2024, 454,546 tons of Russian petroleum products were delivered in violation of the embargo, compared to 549,518 tons in May 2024.[18]

More broadly, the Black Sea has a special significance for the Russian Federation strategically and as an expression of Russian expansionism. Admiral Feodor Ushakov was responsible for the naval victories at the end of the 18th Century, which gave Russia dominance of the Black Sea and put an end to the Ottoman Empire's maritime control. His fame transcends the two centuries since his death, with Ushakov's personality embraced by both the Soviet Union and today's Russia, especially under Putin. He still has numerous monuments in Russian cities, streets, ships, and maritime institutes bearing his name, and Russians still consider him a hero: "This is

the legacy of the life of Admiral Ushakov - the man who gave the country the Black Sea".[19] In 2001, the Russian Orthodox Church canonised him, declaring him patron of the naval forces, and in 2005, Russia's Patriarch Alexei II, in a religious ceremony in the cathedral where the admiral is buried, also declared him patron of the strategic bomber forces.[20] This exemplifies how the symbols of imperial tradition, modern-day Russian militarism and the Russian Orthodox Church are interweaved by the Putin regime to promote its interests.

For the Russian Federation, the Black Sea is the channel through which it projects its power into the Mediterranean, the Middle East, and Africa. The Russian intervention in Syria and involvement in the civil war in Libya could not have been done without the input of the Russian Black Sea Fleet. On 31 July 2022, Putin signed a decree putting into force the new maritime doctrine of the Russian Federation. The document emphasises the confrontation with the US and its allies and shows, with regard to the Black Sea and the Sea of Azov that the first two of the Russian maritime policy objectives are 'extensive

reinforcement of the geopolitical position of the Russian Federation in the region and ensuring, based on the norms of international maritime law, an international legal regime favourable to the Russian Federation in the Black Sea and Sea of Azov'.[21] The most important element is Crimea, without which Russia cannot dominate the Black Sea. Any scenario for Ukraine which envisages the Russians keeping Crimea would mean the maintenance of Russia's aggressive behaviour in the Black Sea and the continuation of its actions to affect freedom of navigation there. These actions have included floating mines, intensive electronic warfare, cyber-attacks, abusing the legal right to hold naval exercises to intimidate shipping and block EEZ perimeters in the Black Sea, and abusive inspections of ships under the pretext of counter-terrorism precautions.

Figure 9. Armed Russian inspection of cargo ship in Black Sea, 15 August 2023.

Source: Russian MoD as seen on Sky News

Figure 10. Perimeter blocked by Russia - Romanian and Bulgarian EEZ, in 2022 and 2023.
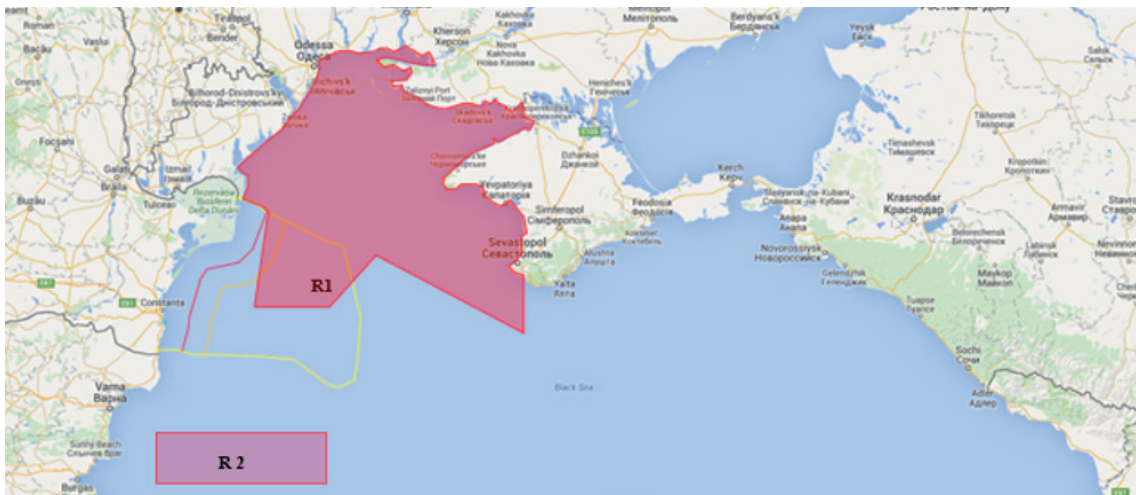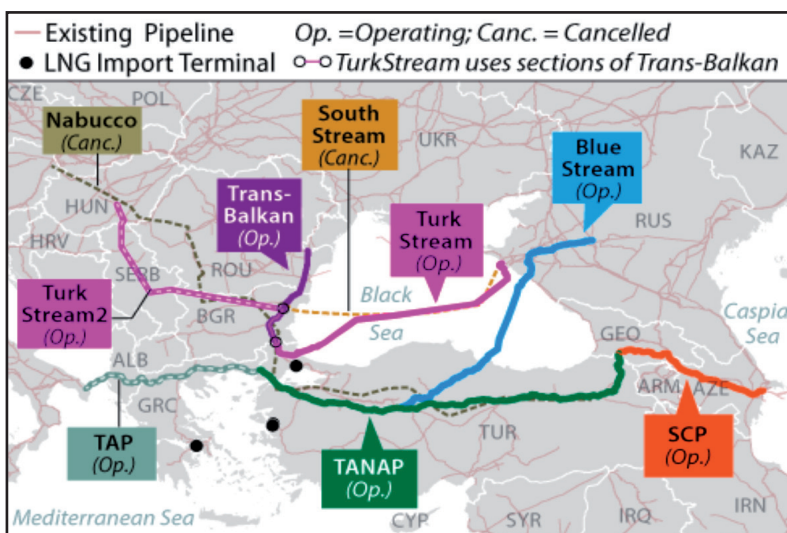

Source: New Strategy Center

Figure 11. Critical pipelines.
Source: Congressional Research Service, U.S. using data from U.S. Department of State, IHS, ESRI, European Network of Transmission System Operators for Gas, and Bulgartgransgaz
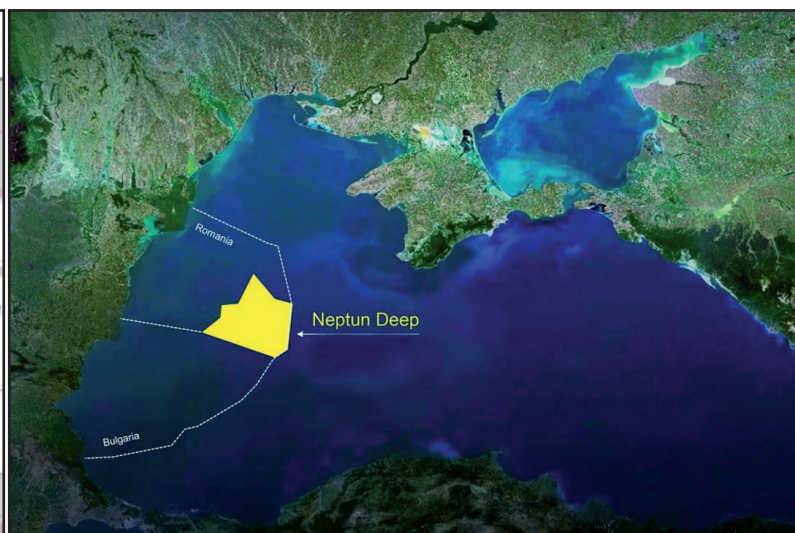

Figure 12. Neptun Deep.
Source: OMV Petrom

The Black Sea and Energy

The Black Sea and its littoral contain several critical pipelines, particularly for gas transportation, that play a vital role in the energy dynamics of the wider region. These include TurkStream, Blue Stream, Trans Adriatic Pipeline (TAP), Trans-Anatolian Natural Gas Pipeline (TANAP) and the BRUA pipeline, each serving distinct yet interconnected purposes. These pipelines are integral to the flow of natural gas from current major producers like Russia and Azerbaijan to key markets in Türkiye, Central Europe, and beyond. In addition to the existing network, new projects are continually being developed to further expand the region's energy capacity and resilience, reinforcing the ongoing strategic importance of the Black Sea as a crucial energy corridor to meet the evolving energy needs of the surrounding nations.[22]

By exploiting that natural gas resources within its Exclusive Economic Zone (EEZ), Romania could become the EU's largest gas producer by 2027.[23] The most prolific sector is Neptun Deep, with gas reserves estimated at 100 bcm, located in the south-eastern part of Romania's EEZ, at the intersection with the EEZs of Russia, Türkiye and Bulgaria. The size of the sector is 7500km2, with water depth in the development area between 100 and 1000 meters. The value of the investment required is estimated at €4 billion. The construction of the necessary infrastructure will take place between 2024 and 2026, with the first gas molecule to be delivered in early 2027.[24]

Given Russia's behaviour so far, especially in terms of the type of 'hybrid' actions described above and the significance of energy as a political tool for Moscow, particularly in the region neighbouring Romania, this work could trigger actions by the Russian Federation aimed at disrupting the construction process of infrastructure around the Neptun Deep perimeter. These actions would be in the category of 'grey zone warfare', some of them unavowed or

difficult to attribute. It seems implausible that Russia would passively let Romania become a major gas exporter to the region, which would permanently diminish GAZPROM's presence and, by extension, Russia's political influence and its ability to destabilize and undermine NATO and EU cohesion.

The following types of Russian actions appear likely:

- blocking maritime sectors under the pretext of military exercises;

- movement of naval assets, for intimidation and harassment, in the vicinity of civilian vessels constructing infrastructure (possibly with demands to search vessels under various pretexts);

- incursions by Russian aircraft in the vicinity of vessels contracted by the operator of the Neptun Deep project;

- false-flag sabotage actions;

- electronic warfare actions to disrupt navigation and dynamic positioning systems;

- violation of safety zones of drilling or extraction platforms;

- disregard of prohibited anchoring radii in the area of submarine pipelines and cables;

- placement of mines (real or fake) by Russian submarines to force stoppage/delay of works;

- virulent disinformation campaigns on environmental and/or blatantly anti-western/anti-sovereignty issues to create a negative public opinion of the project and diminish political support for it;

- cyber-attacks.

It is important for Romania to inform its NATO and EU allies of the envisaged risks in the EEZ and to request the deployment of deterrent capabilities to complement existing national capabilities or to make up for the absence of some until they arrive in Romania and become operational, as is the case with anti-ship missile systems. The situation is also made more difficult by the fact that the exclusive economic zones, not being territorial waters, do not fall under the security umbrella of Article 5 of the North Atlantic Treaty, and the provisions of the Montreux Convention, as currently implemented by Türkiye, do not allow the entry of non-coastal NATO states' vessels into the Black Sea. The lack of substantial naval capabilities on the part of both Romania and Bulgaria greatly reduces the deterrent element. This is precisely why it is necessary to increase cooperation among the NATO states bordering the Black Sea —Romania, Bulgaria, Türkiye— with important steps already taken in early 2024 when the trilateral cooperation format between the three states for mine countermeasures came into effect. Missions in this trilateral format should be extended in 2025 to include missions to protect critical infrastructure in the EEZ. In addition, consideration should also be given to stepping up Romania's cooperation with Türkiye in the naval field, especially by carrying out joint patrol exercises and missions in the Neptun Deep (Romanian EEZ) and Sakarya (Turkish EEZ) sectors, to deter hostile actions by the Russian Federation. Both Romania and Türkiye are interested in rapidly developing their natural gas exploitation infrastructure in the sectors where significant reserves are estimated to exist—this would have a major positive impact on the energy independence not only of the two countries, but also the region more widely.

These strategic energy projects may be endangered by Russia's hybrid actions. This could be the place for Russia to test NATO's cohesion and commitment to act firmly and decisively to protect a member state. The Kremlin might exploit the weaknesses of Romanian or Bulgarian naval forces and the Allies' reluctance to escalate or provoke Russia, particularly in response to actions that are difficult to attribute and trace.

The Black Sea and Russia's strategy

If Russia's war on Ukraine ended tomorrow, on the current line of contact, it would mean that Crime would remain under Russian occupation. With Crimea under its control, Russia will be able to continue its aggressive behaviour to obstruct freedom of navigation in the Black Sea, as it has done so far. Hybrid actions—such as blocking maritime sectors under the pretext of naval exercises, abusively inspecting ships, and jamming ships' GPS signals—would persist. Mines will continue to pose a great danger to navigation. If Ukraine receives less military and financial support from its allies, primarily the US and the EU, and begins to give in to Russian pressure on the ground, the danger of Ukraine's entire Black Sea coastline being conquered by Russia will increase. The objective of conquering 'Novorossiya', meaning the entire Ukrainian littoral all the way to the Danube, was emphasised
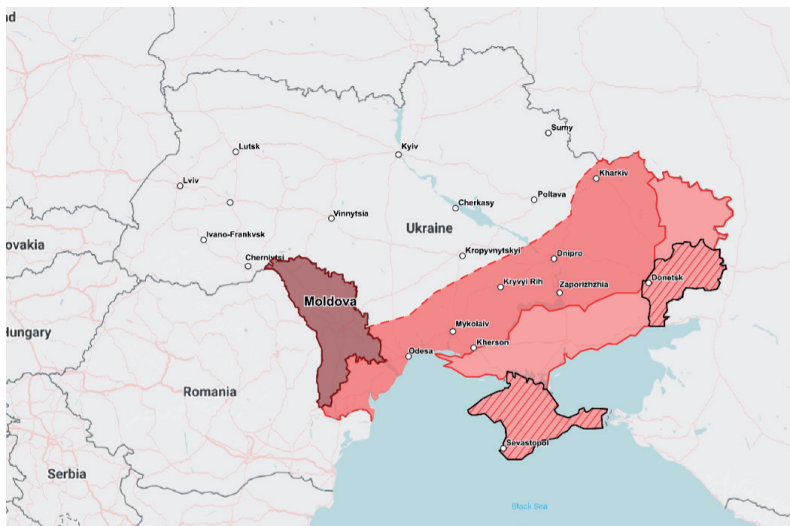

**Figure 13.** The worst-case scenario in the Russian war in Ukraine.

Source: New Strategy Center

again by Putin at one of the August 2024 Security Council meetings, where he commented that the objective of Ukraine's attack in the Kursk region was "to stop the offensive of our troops for the full liberation of Novorossiya[...]But all along the line of contact our troops are moving forward".[25]

An eventual occupation of the entire Ukrainian littoral by Russia would most likely also lead to the occupation of the Republic of Moldova. Russia would no longer be content with installing a puppet regime in Chisinau, but would annex the country, so moving its own borders to the Prut River. This scenario, with Russia on the Danube and the Prut, is Romania's geostrategic nightmare. Russia could then block trade and free navigation on the Danube as well as the Black Sea, and occupy Snake Island, located near the Romanian port of Sulina at the Danube's mouth. On this new frontier, Russia would install electronic warfare, surveillance and intelligence equipment, moving its Anti-Access/Area Denial (A2/AD) umbrella even closer to NATO. Russia would have a land border with another NATO state, Romania, which would also extend the risk of direct confrontation on land to the southern part of NATO's Eastern Flank, as in the Baltic countries.

The Danube Delta, which would become a border area between Russia and Romania, is a land full of lakes, swamps, small canals, vegetation; favourable for infiltration of Russian special operation forces for acts of sabotage, very similar to the Dnieper Delta. In addition, a large part of Romania's Russian minority, the Lipovenes, live here, which can create a pretext for Russia to claim protection for 'Russians oppressed by Romanians'. The Kremlin's concept of the 'Russian World' does not only imply Russia's right and obligation to protect those

Figures 14-15. The Danube Delta.
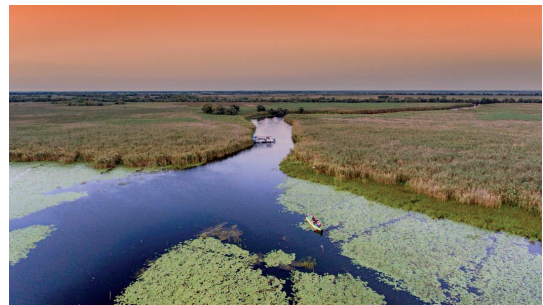
Source: istockphoto.com

Source: Ioan Cepaliga, web archive

who have Russian citizenship and live in the post-Soviet space, but also those who feel and speak Russian. This significantly expands the framework, giving Russia a pretext for arbitrary intervention if it deems it necessary. Campaigns of disinformation against Romania would intensify, using all levers to weaken the institutions of the Romanian state and citizens' confidence in them, in NATO, the EU and the US. Although the Romanian people are known for their negative sentiments towards Russia, as a result of unfortunate historical interactions, this does not mean that Russia would not attempt to sow mistrust, suspicion, defeatism and an inclination towards neutrality, by playing on the fear of direct military confrontation with Russia, the danger of a nuclear strike from Moscow and, above all, the fact that Romania would be isolated and dependent on its NATO allies.

In order to better understand how Russia will act, we must remember what was said by one of the most representative thinkers of Russian Neo-Imperialism, Aleksandr Dugin:

"Who will be quicker to develop a model for the disintegration and chaoticization of societies other than their own, will be the winner in this complex game of construction of new international relations, new societies and a new philosophy of life. Chaos is a multipurpose weapon".[26]

NATO's Posture in the Black Sea

NATO has long recognised the strategic importance of the Black Sea and the Black Sea region. In its most recent Summit Declaration, NATO leaders said: "The Western Balkans and the Black Sea regions are of strategic importance for the Alliance. We remain strongly committed to their security and stability… We reaffirm our continued support to Allied regional efforts aimed at upholding security, safety, stability and freedom of navigation in the Black Sea region…"[27] As part of the set of assurance measures taken by the Alliance following Russia's annexation of Crimea in 2014, a number of Allies have provided assets to enhance air policing in the region, augmenting the capabilities of Bulgarian and Romanian air forces.[28] Since then, the UK has contributed to air policing five times with detachments of Typhoon combat aircraft to Romania's Mihail Kogalniceanu (MK) air base—most recently, for three months in the first half of 2024.[29] Between 2014-2022, a number of Royal Navy warship deployments into the Black Sea took place—and the British Army participated in land-based exercises in Romania.[30]

In response to Russia's full-scale invasion of Ukraine in February 2022, the Alliance agreed to establish four additional multinational battlegroups on its eastern flank—in Bulgaria, Hungary, Romania and Slovakia.[31] At the Madrid Summit in June

2022, Allies agreed that all eight battlegroups could be scaled up to brigade size where and when required.[32] The Framework Nations for the battlegroups in Bulgaria and Romania are Italy and France respectively, with contributing nations drawn from across the Alliance including (in both countries) the US. Alongside the Summit, the US committed to maintain an additional rotational Brigade Combat Team in Europe, to be positioned in Romania, with the ability to deploy subordinate elements for training exercises across the eastern flank.[33] Individual NATO states have continued to deepen their bilateral defence cooperation with Bulgaria and Romania, while sustaining their defence relationships with Türkiye and (NATO partner country) Georgia. For example, the UK and Romania announced a Romanian-British Strategic Partnership in March 2023, with commitments to deepen cooperation across many aspects of defence.[34] Multinational land-based exercises and air deployments continue, contributing to NATO's deterrence and assurance posture in the Black Sea region.

However, under Türkiye's interpretation of the Montreux Convention, non-littoral NATO states have not deployed naval vessels into the Black Sea since February 2022[35] This situation stands in sharp contrast to that in the Baltic Sea[36] and leaves a potential vulnerability to aggressive Russian behaviour in the maritime domain, not least *vis-à-vis* the new energy infrastructure in Romania's EEZ. While the trilateral cooperation between Bulgaria, Romania and Türkiye discussed earlier may partially fill this gap, other NATO states need to consider whether they could deploy capabilities such as UAVs for surveillance.

Conclusions

The key take-aways from this study are:

- Russia's war on Ukraine is part of a global conflict waged by Russia—supported by China—against the West and especially the US;

- A Russian victory in Ukraine would harm the prestige and credibility of the US and its allies, especially among the states of the Global South;

- The Black Sea and the South China Sea are the two main spaces where Russia and China are acting to affect the freedom of navigation and the interests of the US and its allies;

- The Black Sea region is strategically important because it provides connectivity between Central Asia and Europe, between the Baltic Sea and the Mediterranean, between the Balkans and the Middle East;

- The Black Sea contains important energy routes and substantial gas reserves of its own, with a major impact on the energy independence of the states in the region from Russia;

- The Black Sea is important for the military mobility of the Southern part of NATO's Eastern Flank;

- The Black Sea is vital for Ukraine's economy and exports. The countries in the Black Sea region and Ukraine play a major role in ensuring global food security, especially for countries in Africa and the Middle East;

- The Black Sea has major strategic importance for Russia. It represents Russia's historic obsession with access to warm seas, a platform for the projection of Russian military force towards the Middle East, the Mediterranean, and North Africa;

- The Black Sea is a major Russian export gateway for oil and petroleum products;

- The Black Sea would remain a contested territory even if the war in Ukraine freezes and there is a ceasefire between Ukraine and Russia. Russian naval aggression would continue especially if Russia maintains control over Crimea;

- Russia will continue to try to disrupt free movement in the Black Sea, by blocking maritime sectors under the pretext of naval exercises, conducting abusive inspections of ships, jamming ships' GPS, laying mines, disinformation campaigns, and cyber-attacks;

- Russia is likely to try to disrupt the major energy projects of the NATO states in the Black Sea, primarily Romania's. In 2027, Romania may become the largest gas producer in the EU, seriously diminishing Russia's influence in the region;

- Russia's major objective remains the occupation of Ukraine's entire Black Sea littoral and the suffocation of Ukraine's economy. If Ukraine is not firmly supported militarily by the US and the EU, in time and in the necessary quantities, Russia may increase the pace of its conquests, including by occupying the coastline. Western financial support to balance the budget is equally important to prevent a collapse of the Ukrainian state;

- Russia at the mouth of the Danube would also means the conquest of the Republic of Moldova. Russia at the mouth of the Danube and on the Prut River would be Romania's geostrategic nightmare and would extend the risk of a direct confrontation on land between Russia and NATO to the southern end of NATO's Eastern Flank as well as in the Baltic States.

Policy Recommendations

For NATO:

- Increased NATO involvement is needed in the Black Sea region, through ISR capabilities, naval drones, and A2/AD capabilities, to compensate for the limited naval presence in the Black Sea itself and the restrictions of the Montreux Convention;

For NATO/EU:

- The Centre of Excellence on Hybrid Warfare should advise on steps to reduce the vulnerability of Romania's new gas project to Russian hybrid actions;

For NATO Allies:

- Romania, Bulgaria, and Türkiye should expand their current cooperation on mine action and protection of critical energy infrastructure in the Black Sea. Türkiye and Romania can accelerate bilateral cooperation, through joint naval exercises and patrol missions for the protection of critical energy infrastructure, considering that both countries are developing major offshore gas exploitation projects in the Black Sea;

- Other NATO states should consider whether they could increase their cooperation with Romania, Bulgaria and Türkiye (e.g. in training and exercises) to enhance the capability of the trilateral arrangement.

For the EU:

- Increase investment to improve the Danube's transport capacity, so that navigation is facilitated during the summer period when rainfall and the Danube's flow decrease. ▪

Appendix

Economic Significance of the Black Sea: trade, energy and telecommunications

Summary

The Black Sea is a key hub for trade in energy, grains, and other commodities, and constitutes a main economic artery for the economies of its bordering nations. A crossroads between East and West and an arena of confrontation, competition and convergence between NATO members Romania, Bulgaria, and Türkiye, NATO partners Ukraine and Georgia, and the Russian Federation, this strategic chokepoint is of obvious importance.

This data set available at the hyperlink below seeks to elucidate the Black Sea's significance **regionally** and **globally** using publicly available (and mainly official) data on the maritime trade of oil, natural gas, and grains, as well through a brief review of the critical infrastructure present in the region.

Dominating the region is the Russian Federation. Russia accounts for the majority of the total maritime container shipping of both fuel and food and has the largest naval presence in the area—owing to Türkiye's interpretation of the Montreux Convention, banning the entry or exit of military vessels since Russia's full-scale invasion of Ukraine in 2022. This makes the Black Sea, which houses Russia's only warm-water ports, of key strategic importance to its war machine as a route to export its fuel products—both through shipping and pipelines.

The other Black Sea nations also rely heavily on a free and open Black Sea for their own exports, as do nations around the globe which receive these key commodities.

We will seek to answer: what proportion of European and Global exports pass through the Black Sea; how much natural gas, oil, and grain is produced by Black Sea nations; and what are the trends in this respect—is the region growing or decreasing in economic importance?

Black Sea Trade, Energy, and Infrastructure data set:
http://rb.gy/03ewvg

Endnotes

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