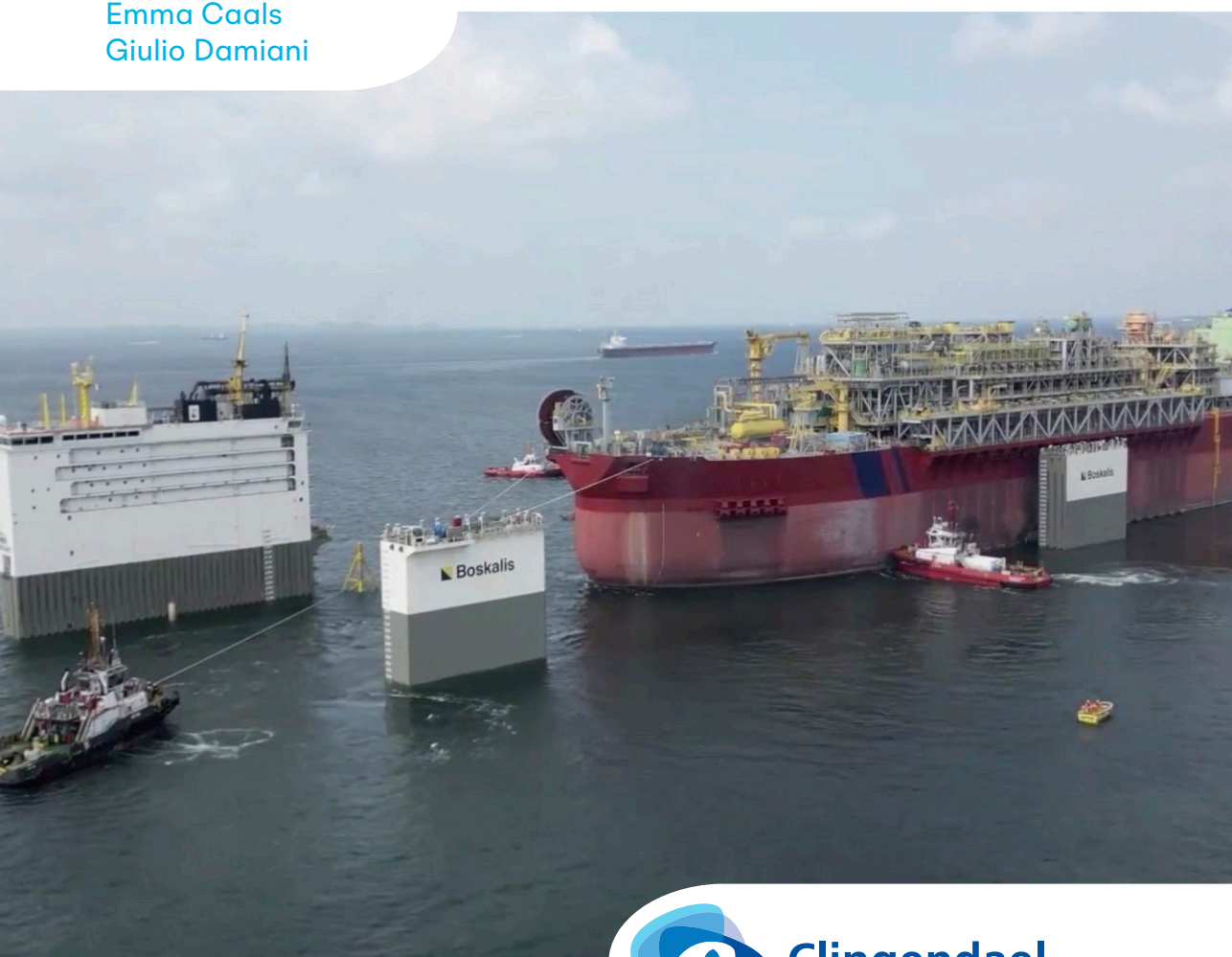


Black Sea Security as the White Knight for peace?

Navigating risks and prospects for talks

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Clingendael Report



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October 2025

* The authors would like to thank Dr. Yevgeniya Gaber (Senior Fellow, Atlantic Council), Bob Deen (Clingendael), and Alexandre Ferreira Gomes (Clingendael), as well as the policymakers, academics, and experts who contributed their insights during the interviews.

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Executive summary

The Black Sea region is a mosaic of political systems, security alignments and strategic priorities, where Russia's war against Ukraine has diversely affected the commercial and military standing of littoral states, namely – in addition to Russia and Ukraine – Romania, Bulgaria, Türkiye and Georgia. This report explores how Russia's war on Ukraine affects Black Sea security and Europe's capacity to enhance regional deterrence.

For Ukraine, the Black Sea remains a vital economic lifeline, particularly in supporting the country's agricultural exports. For Russia, the region represents a strategic and economic hub for projecting power and hindering others to benefit from the Black Sea. Ukraine prioritises restoring its sovereignty and obtaining lasting security guarantees on land, in the air, and at sea, while Russia seeks to entrench territorial control and influence. As a result, their positions remain too far apart for meaningful negotiations. Reaching an agreement on the governance of the Black Sea is considered essential not only for a future settlement of the war, but also for Europe's broader security architecture, including food and energy security, maritime safety, and regional stability. At the same time, emerging trade corridors that bypass Russia, along with the region's renewable and offshore energy potential and growing infrastructure investments, give the Black Sea renewed geostrategic significance for the European Union.

Consequently, for Russia, maintaining or even intensifying hybrid operations in the region – ranging from disinformation and military build-up to the covert sabotage of undersea infrastructure, gas platforms and commercial traffic – remains a viable strategy. Countering these threats and harnessing the region's strategic value depend on securing Ukraine's access to the Black Sea, reducing the vulnerabilities of littoral states, and strengthening deterrence through a dedicated maritime coordination mechanism.

Constructive engagement among the Black Sea littoral states, Türkiye and Ukraine among them, and the EU constitutes a key dimension of regional security efforts. Ankara's control of the Turkish Straits under the Montreux Convention provides it with influence over any ceasefire mission. Such a mission would necessarily involve a visible maritime force, real-time intelligence sharing, and direct coordination with all littoral states. The EU's emerging approach

appears to build on the Mine Countermeasures Black Sea Task Group and the EU Maritime Security Hub, in addition to creating new structures, it aims to develop a more permanent security architecture supported by credible deterrence and sustained military and technological assistance to Ukraine — including guaranteed access to its ports and modern air-defence and naval systems.

Regional stability also depends on the economic and political resilience of the littoral states. Improving connectivity can strengthen their resilience and ability to contribute to a stable and secure Black Sea region. EU member states, Romania and Bulgaria, serve as important anchors of regional resilience, yet further upgrades to transport links with Türkiye and Moldova are needed to enhance military mobility and stimulate economic growth. A broader Black Sea strategy should therefore be closely integrated with the EU's other North–South connectivity initiatives — particularly the Baltic–Black Sea–Aegean and Corridor 8, which links the Black Sea with Adriatic Sea routes — as well as the Global Gateway, ensuring that investments advance both economic and defence objectives. Europe can reinforce stability in the Black Sea region by strengthening credible maritime deterrence, integrating monitoring efforts, and sustaining economic engagement.

Abbreviations

ATM	Autonomous Trade Measures
BSEC	Black Sea Synergy and the Organization of the Black Sea Economic Cooperation
BSS	EU Black Sea Synergy
BSSC	Black Sea Submarine Cable
EBRD	European Bank for Reconstruction and Development
EEZ(s)	Exclusive Economic Zone(s)
EIB	European Investment Bank
EU	European Union
EUMM	European Monitoring Mission
ISR	Intelligence, Surveillance, Reconnaissance
MCM Black Sea	Mine Countermeasures Black Sea
MCMVs	Mine Countermeasures Vessels
NATO	North Atlantic Treaty Organization
TITR	Trans-Caspian International Trade Route

1 Introduction

The Black Sea has long been of strategic importance, lying at the crossroads of Europe, the Caucasus, and the Middle East. Its significance stems from its role as a gateway for energy transit, trade, and military access. Russia's war against Ukraine has reshaped the region's security landscape, disrupting trade and maritime operations while posing broader challenges for both Black Sea NATO members and non-aligned littoral states.

In response to Russia's increasingly hostile actions, littoral states are taking measures to safeguard their economic and security interests. Until the war is resolved, security in the Black Sea and the wider region will remain under strain, making it a pressing regional priority. Prospects for ending the war through a negotiated settlement remain limited, as the two sides' positions are still too far apart to provide sufficient overlap for meaningful negotiations.

For Ukraine, the Black Sea is an economic lifeline, vital for exporting grain and other commodities to international markets and for maintaining its role in global food security. The Russian blockade of Ukrainian agricultural exports has demonstrated how disruptions in maritime navigation directly translate into global price shocks and shortages. Ukraine's objectives are centred on restoring territorial integrity, ensuring security guarantees to prevent the recurrence of war and maintaining access to international shipping routes. A premature ceasefire without such guarantees could entrench Russia's occupation and undermine Kyiv's long-term survival.

Russia, by contrast, seeks to consolidate control over Crimea and other occupied territories, maintain influence through energy pipelines and hybrid operations, and reshape the Black Sea into a contested rather than cooperative space. For Moscow, a ceasefire without clearly defined conditions could provide time to mitigate the effects of sanctions and pursue hybrid tactics to destabilise Ukraine and the wider Black Sea region.

The Black Sea thus occupies a central role in any discussion of potential ceasefire arrangements and long-term settlement. Beyond the immediate concerns of territorial sovereignty, it raises issues of food and energy security, the freedom and safety of commercial navigation, the protection of strategic

infrastructure, and the stability of regional alliances. Whether and how these challenges are addressed will not only shape the outcome of Russia's war against Ukraine but also define the future security architecture of both the wider Black Sea region and Europe as a whole.

This report explores how Russia's war against Ukraine affects Black Sea security and Europe's capacity to enhance regional deterrence. For strategic reasons, it also considers key adjacent states, such as Moldova and Georgia, whose vulnerabilities and geographic positions influence regional stability. It addresses three key questions:

1. What is the Black Sea's strategic relevance for Europe, and how has the Russia–Ukraine war affected it?
2. How does Russia's dominance in the Black Sea impact regional stability and European resilience?
3. Which priorities should guide Europe's security and economic strategies, and how can these shape its diplomatic role in ending the war?

The report identifies priority areas for the EU and the EU-aligned littoral states to strengthen regional security through credible deterrence, social and economic resilience, and energy independence while curbing Russia's disruptive influence.

This report draws on a combination of literature reviews, an analysis of economic and government data, and interviews with policy experts and diplomats to provide a comprehensive assessment of Black Sea security and Europe's regional strategy. Insights were gathered from secondary sources as well as primary conversations with experts to ensure a nuanced understanding of both the strategic and economic dimensions of the region. This mixed-methods approach underpins the analysis throughout the report, supporting evidence-based conclusions on the Black Sea's strategic relevance, Russia's influence on regional stability, and priorities for Europe's security and diplomatic engagement.

The first chapter of the report analyses the Black Sea's strategic relevance for Europe and how the Russia–Ukraine war has affected it. The second chapter discusses how Russia's dominance in the Black Sea impacts regional stability and European resilience. The third chapter outlines the priorities to guide Europe's regional strategy, and how these can shape its diplomatic role in ending the war. In the conclusion, specific recommendations are made for the EU and EU-member states bordering the Black Sea.

2 Strategic shifts in the Black Sea: can regional coordination succeed?

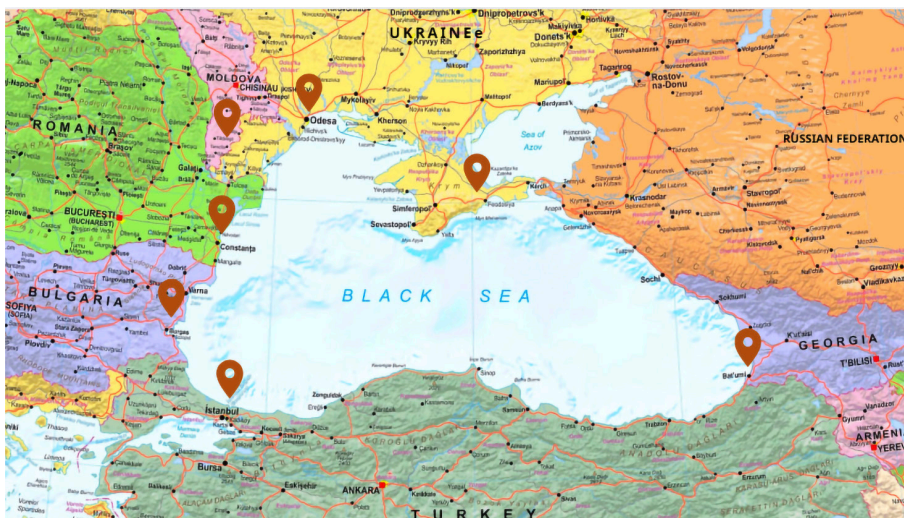
This chapter explores the Black Sea’s strategic significance for Europe and how the ongoing Russia–Ukraine war has reshaped the region’s security and political landscape.

Unlike the Baltic Sea, where littoral states are largely aligned as EU and NATO members, the Black Sea littoral states present a mosaic of political systems, security alignments and strategic priorities. Bulgaria and Romania are both EU and NATO members; Türkiye is a NATO ally but follows an increasingly independent course with regional power aspirations; Ukraine, Moldova¹ and Georgia are EU candidates, although the last appears to be drifting away; and Russia represents both one of the region’s major military powers and its main instigator of insecurity. This fragmented context, driven by widely diverging strategic interests, complicates any future models for coordination and governance.

Multilateral platforms such as the EU’s *Black Sea Synergy* and the *Organization of the Black Sea Economic Cooperation (BSEC)* have created frameworks for cooperation on energy, transport, and the environment.² However, they have been far less effective in addressing security concerns, particularly in the wake of Russia’s 2022 invasion of Ukraine. The resulting instability discourages investment and raises questions about the long-term viability of ambitious infrastructure projects.

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- 1 While Moldova is a non-littoral state, it acts as a “security buffer” whose vulnerabilities can amplify broader regional risks, making it important to be considered in strategies for Black Sea resilience and EU security planning. Its border with Ukraine and its proximity to the Black Sea give Russia opportunities to exert influence through Transnistria, where Russian forces maintain a military presence, and via hybrid tactics such as disinformation and economic pressure. This can indirectly affect Black Sea security by creating instability along Ukraine’s western flank, threatening supply chains, and influencing Moldova’s alignment with European institutions.
 - 2 EEAS, “[Black Sea Synergy: success in regional cooperation despite challenges](#)”, Strategic Communications, July 2024.

Figure 1 Black Sea littoral states and Moldova



Ripple effects

The Russian war against Ukraine has had divergent impacts on the littoral states. Georgia's trade statistics have increased sharply, driven by growing commercial and business ties with Russia, an inflow of skilled IT workers, and the facilitation of sanctions evasion.³ These developments have likely contributed to the ruling elite's political shift away from the EU-accession track. Moldova's trade and economy, by contrast, are suffering. Romania's river ports, however, have benefited from increased traffic, providing a safe alternative route for regional exports and trade. This growth has enabled the renovation and expansion of both river and seaport facilities. Bulgaria's artillery factories have been operating in three shifts since the start of the large-scale invasion. The industry is now seeking investment to expand production in the coming years.

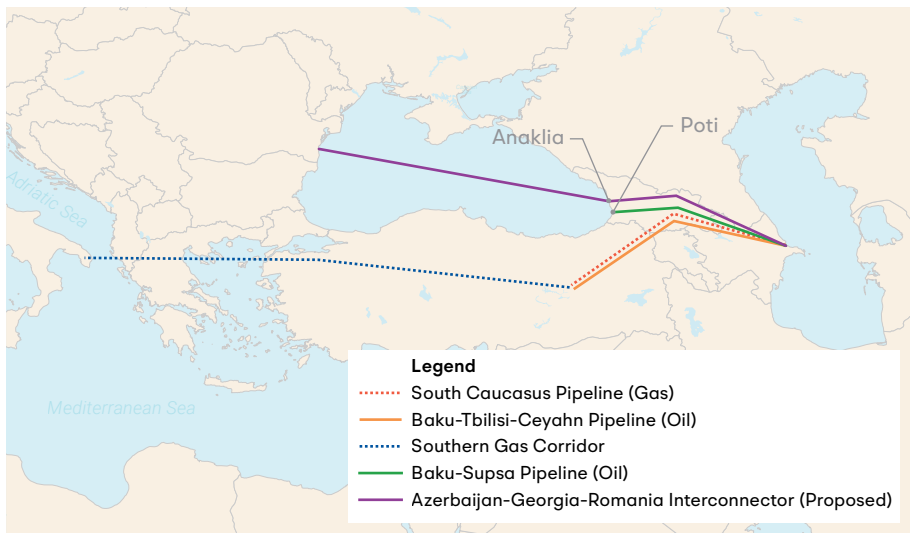
The EU has also invested in improving road and railway connectivity between Romania, Bulgaria and Moldova. These upgrades could further strengthen North-South connectivity, a longstanding weak link in NATO's eastern flank

3 Vakhtang Partsvanja, Erekle Pirveli, "[Georgia's Role in Sanctions Evasion: A Transit Hub for Russia?](#)", Forbes Georgia, 24 October 2024.

defence.⁴ Türkiye, meanwhile, has leveraged its strategic position with both Ukraine (through the Grain Deal in 2023 and defence industry cooperation) and Russia (through trade and gas transit via TurkStream to Europe).

Despite these varied national priorities and differing impacts, all Black Sea littoral states share a common strategic reliance on access to the Black Sea – both the backbone of their economic security and a source of vulnerability. As one example, for Georgia, its role as a key transit corridor for energy resources (Figure 2) from the Caspian to European markets is both a blessing and a curse. The country faces pressure from both Moscow and Beijing to reorient its strategic direction towards their interests.⁵ At the same time, the development of the Georgian deep seaports of Poti and Anaklia remains a geopolitical priority for the EU.⁶

Figure 2 Georgia as a transit corridor for energy resources



4 NATO, “[The Secretary General’s NATO Annual Report](#)”, 2024, and Galip Dalay, Natalie Sabanadze, “[How geopolitical competition in the Black Sea is redefining regional order](#)”, Chatham House, March 2024.

5 Batu Kutelia, Vasil Sikharulidze, “[Strategic connectivity in the Black Sea: a focus on Georgia](#)”, Foreign Policy Research Institute, 15 December 2021.

6 Anastasia Pociumban, “[Connectivity policy: a strategic tool for the EU in its Eastern Neighbourhood](#)”, DGAP, May 2025.

Bulgaria is similarly exposed: around 70% of its transport activity passes through Varna and Burgas, the country's main seaports (Figure 3). Russia continues to conduct military activities in Bulgaria's exclusive economic zone, under the guise of drills, despite Bulgaria's NATO membership. Repeated Russian drone incursions into Romanian airspace, as well as attacks on Ukraine's Danube Delta ports such as Ismail and Reni, raise concerns over unhindered access to the Delta, with implications for regional trade and connectivity.⁷

Figure 3 Commercial and logistical activity across Bulgarian ports



Black Sea yearning

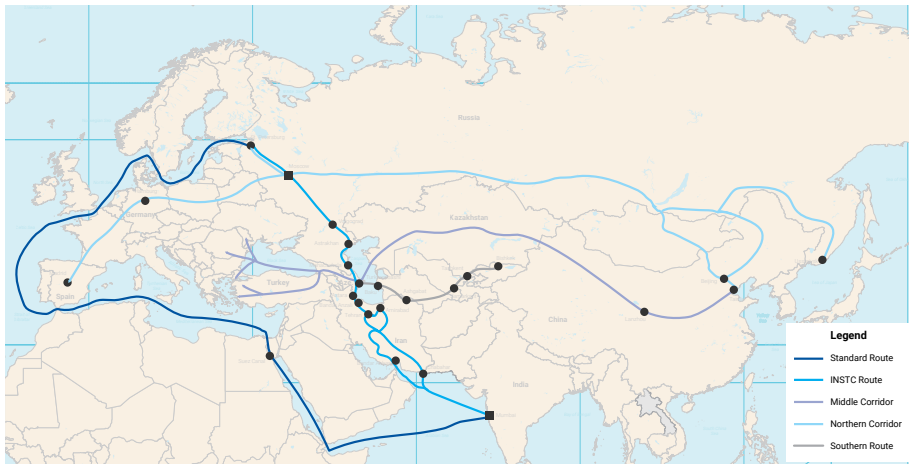
The Black Sea region's long history of rivalry between the Ottoman and Russian Empires adds further complexity to its dynamics. The territory of contemporary Ukraine historically served as the Ottomans' strategic northern buffer against Moscow's ambitions to reach the Bosphorus and Dardanelles Straits, with three centuries of Russo-Turkish wars and Ottoman incursions testifying to the enduring strategic importance of Ukraine's southern coast in this struggle.⁸

7 Krassen Nikolov, "[Bulgaria, NATO discuss response to Russian blockade in Black Sea](#)", EURACTIV, September 2023.

8 Yevgeniya Gaber, "[To help bring lasting peace to Ukraine, Turkey should enhance its cooperation on Black Sea security](#)", Atlantic Council, 14 July 2025.

Today, the competition persists: Ukrainian drone and missile attacks on Russia's Black Sea fleet are shifting the power balance in Ankara's and NATO's favour, effectively aligning Turkish and Ukrainian interests in deterrence and maritime security. Moreover, Türkiye has played an active role in efforts to end the war by brokering prisoner exchanges and restricting Russia's naval presence in the Black Sea through the continued closure of the Turkish Straits, while maintaining its own independent and influential role outside the EU framework. Although its support for Russia currently remains measured, any shift towards a genuinely pro-Russian stance could create serious divisions within the NATO alliance. Still, there is significant potential for enhanced cooperation between the EU, Türkiye, and Ukraine to strengthen defence ties and address hybrid threats. Such collaboration would be mutually beneficial, bolstering Black Sea stability and reinforcing the broader European security architecture.

Figure 4 Middle Corridor, Northern Route, and Standard Route⁹



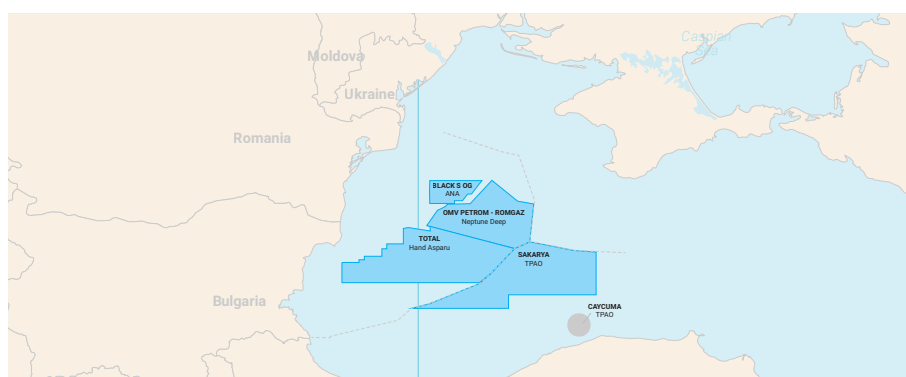
Geostrategic holy grail

The Black Sea has re-emerged as an arena of major geostrategic significance for Europe, particularly after Russia's invasion of Ukraine in 2022 and the Israel–Gaza war in 2023, which disrupted major East Asia–Europe trade routes

9 Ayjaz Wani, "The Middle Corridor: Reviving Connectivity for EU-Central Asia Trade and India's Strategic Imperative", Observer Research Foundation, 13 September 2024.

through Russia and the Suez Canal.¹⁰ This has boosted the prominence of the Trans-Caspian International Trade Route (TITR), or Middle Corridor, linking China and Europe via Central Asia, the Caucasus, and the Black Sea. Trade along the Middle Corridor has expanded rapidly since its 2017 establishment by shipping, port, and railway companies from Georgia, Azerbaijan and Kazakhstan, boosted by key infrastructure upgrades – the 2014 Trans-Kazakhstan railway and the 2017 modernization of the Baku–Tbilisi–Kars line.¹¹ The TITR offers a faster and more secure alternative for connecting China and Europe through Central Asia and the Caucasus, thereby avoiding reliance on Russian infrastructure.

Figure 5 Perimeters of the gas reserves of Romania, Bulgaria and Türkiye¹²



- 10 The TITR offers a 14 to 18-day China–Europe transit, faster than the 19 days via Russia or 22–37 days by sea. After 2022, EU sanctions reduced traffic on the Northern Corridor, while Iranian-backed Yemen’s Houthi attacks in the Red Sea targeting Western vessels linked to Israel during the Israel–Gaza war forced ships around the Cape of Good Hope, adding 3,500 nautical miles and extending voyages to 50–70 days. By 2025, Red Sea container traffic has dropped by 60 %, Rotterdam–Singapore fuel costs have risen by a third, and Europe has faced higher inflation, making the Black Sea a key link in Europe’s reconfigured trade routes. For more information see Aaron McMillan, “[How the shipping crisis in the Red Sea is impacting trade](#)”, Procurement Magazine, March 2025; The Economist, “[The Houthis shatter European pretensions to naval power](#)”, July 2025.
- 11 Ayjaz Wani, “[The Middle Corridor: reviving connectivity for EU-Central Asia trade and India’s strategic imperative](#)”, Observer Research Foundation, September 2024. See also Niels Drost et al., “[Central Asia emerging from the shadows. European Union – Central Asia relations in evolving Eurasian geopolitics](#)”, Clingendael Institute for International Relations, January 2025.
- 12 Sergiu Mitrescu, “[Protecting Critical Maritime Infrastructure in the Black Sea](#)”, New Strategy Center, 2025.

The Middle Corridor also aligns with EU efforts to diversify energy supplies and reduce dependence on Russian gas. In 2022, the European Commission committed €2.3 billion to a subsea electricity cable that will connect Azerbaijan, Georgia and Romania. This project has been labelled one of the Global Gateway's flagship initiatives, reflecting the EU's broader strategy to enhance sustainable and secure infrastructure across its partner regions.¹³ Once operational, it will deliver enough renewable energy to power up to one million European homes. After renewable energy from Azerbaijan and Georgia reaches Romania, it will be integrated into the European grid, supplying electricity to multiple EU member states. Romania, which already generates over 11,000 MW¹⁴ of renewable energy, primarily from wind and hydropower, is set to play a central role in this emerging energy corridor.

Beyond renewables, Romania's Neptun Deep project, one of the EU's largest offshore natural gas reserves in the Black Sea,¹⁵ has the potential to transform regional energy dependency. It holds sufficient reserves to meet Romania's own energy needs, already 80% domestically covered,¹⁶ while also enabling exports to neighbouring Moldova and Bulgaria, reducing their reliance on Russian supplies and TurkStream. Russia is likely to actively oppose this shift, resorting to all available instruments of hybrid warfare, ranging from false-flag operations to potential attacks on energy infrastructure.

Uncertainty about how to respond to these threats and how to protect Exclusive Economic Zones (EEZs), which might fall outside Article 5 guarantees,¹⁷ has

13 The Global Gateway is the EU's strategy for international investment in sustainable and resilient infrastructure. See also: Thijs van de Graaf, "[Corridors of power: the Black Sea Cable between Azerbaijan and Europe](#)", Big Europe EU, 30 October 2024, and Civil Georgia, "[EU to invest EUR 2.3 billion in Georgia-Romania Black Sea electricity cable](#)", December 2022.

14 Natia Gamkrelidze, "[Can the Black Sea energy corridor power Europe's green future?](#)", Belfer Center for Science and International Affairs, Harvard Kennedy School, 17 September 2024.

15 Dilara Kakillioglu, "[Black Sea Energy Resources: An Overview](#)", in *Defending Maritime Assets: Approaches to Critical Infrastructure Protection*, ed. George Scutaru and Murman Margvelashvili (Springer, 2025), 49.

16 Georgi Gotev, "[Romania on its way to become EU's largest gas producer](#)", Euractiv, 10 January 2025.

17 Protecting Black Sea EEZs from hybrid threats is challenging because NATO's Article 5 applies primarily to armed attacks, and its application to hybrid threats, such as cyberattacks or sabotage, remains ambiguous and context dependent. Sanz-Caballero (2023) notes that hybrid threats often circumvent legal boundaries, complicating their classification under mutual assistance clauses

prompted the EU to assert itself as a security actor. Its 2025 EU strategy for a secure, prosperous and resilient Black Sea region¹⁸ links security, connectivity, and prosperity, aiming to create a Maritime Security Hub, mainstream defence cooperation, and foster dual-use infrastructure in the region.

like NATO's Article 5. While states should be able to react to hybrid threats through proportionate countermeasures, the victim state's response may be limited by international law. This limitation makes it challenging to invoke Article 5 in response to hybrid threats targeting EEZs. Furthermore, while NATO doctrine sometimes equates hybrid attacks with armed attacks, this equivalence is not universally accepted, and the threshold for invoking Article 5 remains a subject of debate. For further discussion see: Susana Sanz-Caballero, "[The concepts and laws applicable to hybrid threats, with a special focus on Europe](#)", Humanities and Social Sciences Communications, Article number 360, 29 June 2023, and Aurel Sari, "[Hybrid CoE Research Report 14. Protecting maritime infrastructure from hybrid threats: legal options](#)", The European Centre of Excellence for Countering Hybrid Threats, March 2025.

18 Directorate General for Enlargement and Eastern Neighbourhood, "[New EU strategy for secure, prosperous and resilient Black Sea region](#)", European Commission, 28 May 2025.

3 Russia's power play and weaponisation of dependencies in the Black Sea

This section explores how Russia's dominance in the Black Sea affects regional stability and European resilience. Russia's overarching strategic objective in the Black Sea is driven by its desire to reach the status of a recognised global power and extend its sphere of influence. The export and trade of its vast wealth of hydrocarbon resources and agricultural products give it the necessary leverage. To exploit this to the fullest, Russia requires assured access to the global network of maritime shipping routes and pipelines.

Three priorities define Moscow's approach, the foremost being market access: sustaining Russia's economic leverage at home and abroad. By securing access to key energy corridors such as TurkStream and BlueStream, Russia maintains its connectivity to European gas markets via Türkiye, thereby reinforcing its economic leverage. Agriculture is another important factor in Russia's long-term economic strategy, with Rostov and Krasnodar as key export hubs.¹⁹ Yet Ukraine's more efficient and cheaper production poses a competitive challenge.

Second, coercive leverage: by controlling maritime space in the Black Sea's northern littoral zones, Russia can constrain Ukraine's food exports, a strategy that predates the full-scale invasion. Even before 2022, Ukrainian vessels faced obstacles in the Sea of Azov. Capturing or blockading Odesa would not only cripple Ukraine's economic potential and recovery but also secure Russia's land access towards Moldova, extending its military presence on the border with the EU.

¹⁹ Benjamin Hilgenstock, Elina Ribakova, "[Why Russia's economic model no longer delivers](#)", Peterson Institute for International Economics, 16 July 2025.

Third: beyond the immediate economic rationale, securing access to warm-water ports along the Black Sea supports Russia's broader strategy for power projection into the Mediterranean, the Middle East, and Africa.

Figure 6 Russia's main energy corridors and shipping routes in the Black Sea



To secure its objectives, Russia does not shy away from using various disruptive measures that it has in its arsenal. Its 2022 Maritime Doctrine frames its stance as a “total hybrid war with the Collective West”,²⁰ echoing the 2021 National Security Strategy’s emphasis on resisting external pressure, defending internal unity, and shaping a new global order. This strategic thinking underpins Russia’s military actions, from the ongoing occupation of Transnistria in Moldova since 1992, to the 2008 occupations of Abkhazia and South Ossetia in Georgia, the 2014 annexation of Crimea, and the 2022 invasion of Ukraine. Through hybrid operations, Russia exploits divisions within Europe to delay or fracture

20 TASS, “[Borisov: Russia’s naval doctrine will take into account the strategic changes in the global situation](#).” [Борисов: морская доктрина РФ учитывает стратегические изменения в мировой ситуации], 20 May 2022.

coordinated responses, allowing it to project power despite its own relative military weakness²¹ vis-à-vis the NATO alliance.

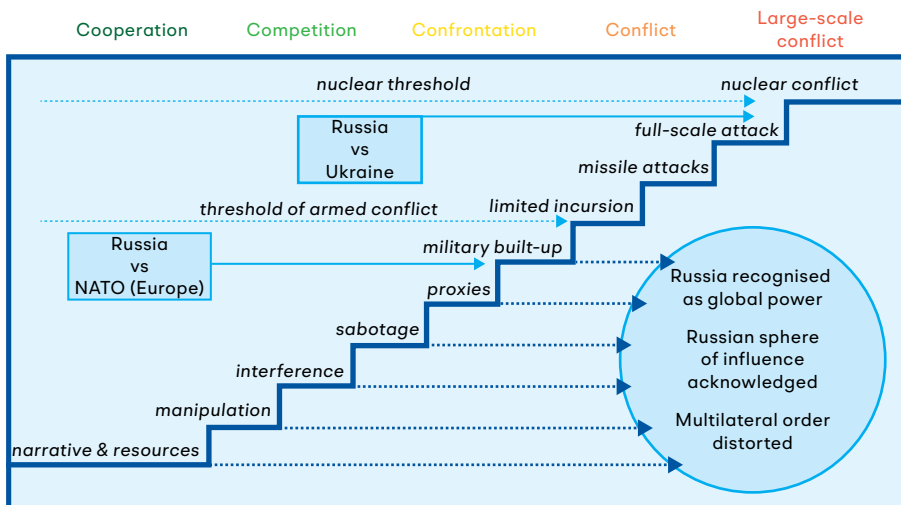
In assessing the Russian threat, it is essential to distinguish between Moscow's goals and the means it employs, as they are carefully aligned. Russia still behaves as a rational actor, adapting its methods according to specific circumstances. At the lower end of the spectrum, it relies on influence operations – manipulating public opinion, media narratives, historical facts, corruption, and electoral outcomes. Efforts to sway elections in Moldova or to cultivate pro-Russian elites in Bulgaria and Romania illustrate how Moscow seeks to steer littoral states towards policies favourable to its interests. When these efforts fail and states lean away from Russia, it escalates its activities. Its tactics then shift to electronic jamming, harassment and “inspections” in contested waters, deniable sabotage of seabed infrastructure, military build-ups, and ultimately direct intervention. This incremental approach shows how hybrid measures are scaled according to the level of resistance encountered and the likelihood of a proportional response.

Figure 7 offers a visual overview of the components of a destabilising (hybrid) campaign. While not intended as a literal playbook, it illustrates the range of measures an aggressive actor might employ, each allowing plausible deniability, to achieve influence, intimidation, and coercion in pursuit of a broader objective. For Russia, that objective is the achievement and broad recognition of its great power status, along with acceptance of its claimed sphere of influence. This process is not strictly linear: an actor can escalate or de-escalate depending on the campaign's progress. The steps shown on the ladder are likewise not exhaustive. New tactics continually emerge, and existing ones evolve to maximise early impact while remaining below the threshold of armed conflict and maintaining deniability, thereby hindering attribution.

Because the effects are constantly assessed and refined through lessons learned elsewhere, the nature of these actions keeps shifting, making effective countermeasures hard to design. Even when specific activities can be attributed, defending against them is challenging, and opportunities for retaliation remain limited.

21 Andrew A. Michta, Joslyn Brodfuehrer, “[NATO-Russia dynamics: Prospects for reconstitution of Russian military power](#)”, 19 September 2024.

Figure 7 Simplified visualisation of the hybrid warfare measures, which in practice are often employed simultaneously across multiple domains²²



The Black Sea offers fertile ground for such operations. Its size and complexity of overlapping interests of the littoral states facilitate grey-zone tactics more easily than in the Baltic. Recent examples include Russian military drills in Bulgaria’s EEZ, followed weeks later by a mine explosion off Romania’s coast.²³ Russian aircraft have monitored civilian vessels in Turkish waters, while Moscow’s manipulation of grain routes unsettles food-importing regions and indirectly affects Europe through migration pressures – underlining its readiness to test boundaries.

Russia calibrates its hybrid actions carefully, avoiding measures that could trigger a direct clash with Türkiye, whose control of the Bosphorus and Dardanelles represents a restraint on Russian naval mobility and energy and other exports. Furthermore, destabilising ports in Bulgaria or Romania, crucial nodes for oil and gas exports, would be counterproductive and costly. Yet Moscow escalates where it expects muted responses. Therefore, the emergence

22 Designed for the research by Senior Research Associate and Vice Admiral (ret.) Ben Bekkering.

23 Maria Simeonova, “[Staying afloat: How the EU can navigate the Black Sea to counter Russian aggression](#)”, European Council on Foreign Relations, 7 October 2024.

of offshore gas projects in the Black Sea does raise the risk of targeted disruption and this affects Romania and Bulgaria, if Moscow views them as competitive threats. Should Russia's access to EU energy markets shrink further – or rival producers expand exports at scale – the likelihood of such provocations will only grow. From this perspective, exploring ways to engage Türkiye in a regional coordination mechanism could sharpen deterrence by increasing the risks Russia must factor into its cost-benefit calculus.

Russia's hostility needs to be recognised as a long-standing strategic policy, not a temporary aberration. Moscow's approach predates Crimea's annexation in 2014 and reflects a sustained intent to weaken its European neighbours. Downplaying this threat has allowed Russia to entrench itself, build alliances, and expand its means of coercion, turning what was viewed as a regional issue into a transatlantic challenge. Developing effective hybrid response measures mirroring the escalation ladder will aid in countering Russian offensive tactics,²⁴ and address incidents such as drone incursions over Poland, helicopter violations in Estonia, or the jamming of aircraft communications – these responses must be prompted to prevent escalation and further provocations.

24 See the proposed approach: Erik Stijnman, "[Countering Russian hybrid warfare](#)", Clingendael Institute for International Relations, July 2025.

4 Anchoring stability and connectivity: bridges, barriers and bargaining power

This chapter outlines the key priorities to guide Europe's regional strategy for the Black Sea and highlights how these actions can reinforce its diplomatic role in ending the war. Given the Black Sea's central role in any future path towards peace, and in preventing the emergence of further conflicts, achieving a minimum level of stability is essential.

Europe can contribute in three ways: a) investing in Ukraine's defence and maritime sectors to ensure that Ukraine maintains access to the Black Sea and that its key ports, like Odesa, remain operational; b) reducing political and economic vulnerabilities in Black Sea states, including countries like Moldova, Bulgaria and Georgia, to limit exposure to hybrid threats; and c) building deterrence for the security of the littoral states by improving connectivity, enhancing support, and deepening trilateral cooperation among NATO's Black Sea members – Romania, Bulgaria and Türkiye. The presence of a coordinated maritime framework is equally important, both to monitor ceasefires and to safeguard commercial navigation while countering hybrid threats.

4.1 Ensuring Ukraine maintains access to the Black Sea

Russia's war on Ukraine remains the Black Sea's most urgent source of instability. The war's outcome will shape the security of all littoral states, and the risks for them will increase sharply if Ukraine's position weakens. As Moscow shows no willingness to negotiate or halt attacks, preserving Ukraine's access to its Black Sea ports and EEZ is critical. If Russia were to sever Ukraine's maritime access or occupy more of its adjacent coastline, it would undermine Kyiv's economic viability, drain its coffers and alter the region's broader balance of power. Control of Ukraine's southern coast would also create a direct land corridor to Transnistria, while bringing Russian military assets closer to NATO territory. This would position Moscow to deploy certain types of weapons from a shorter distance against

Romania, Bulgaria, and other NATO members, further heightening regional insecurity.

Figure 8 Russia's naval blockade, August – September 2022²⁵



Ensuring lasting access to the Black Sea demands a multifaceted approach. First, any ceasefire or eventual peace agreement must explicitly guarantee Ukraine's right to operate its Black Sea ports – especially Odesa – and include long-term (deterrence) measures to prevent renewed Russian aggression. Without such provisions, Moscow could regroup and again attempt to choke Ukraine's maritime lifeline.

Second, military and technological support is central to this goal. Ukraine has successfully denied Russia control over large parts of the Black Sea. Since regaining control of Snake Island, the Boyko towers, and much of its territorial waters,²⁶ Kyiv has reshaped the Black Sea's security dynamics. However, it has struggled to sustain the level of USV (unmanned surface vessel) and UAV (unmanned aerial vehicle) attacks required to push the Russian navy further back

25 George Scutaru, Peter Watkins, "[Security Challenges in the Black Sea: NATO, the wider region and the global order](#)", New Strategy Center, 2024.

26 A Russian amphibious task force built up before the invasion was meant to support the land campaign, but Ukrainian littoral defences and sea mines prevented an assault, allowing Ukraine to hold the coast west of the Dnipro and Odesa. Russia then seized Snake Island as a fallback but lost it after repeated Ukrainian attacks. Strikes with cruise missiles and unmanned surface and aerial vehicles, including the sinking of the *Moskva* in April 2022, forced the Black Sea Fleet to retreat, ultimately relocating to Novorossiysk.

and to curb air- and missile-based strikes on Ukrainian seaport infrastructure. As a result, Russia retains the capability to strike Ukraine's maritime assets and continues to threaten Ukrainian exports overseas through missile attacks and the potential obstruction of shipping routes. Meanwhile, maritime tactics on both sides continue to evolve rapidly as innovation accelerates.²⁷ Continuous funding for domestic research, the production and rapid adaptation of naval and submarine drones, along with expanded payload capacity, are crucial to sustain Ukraine's edge. Equally important is a steady supply of modern anti-air missile systems to protect port infrastructure, shipyards, and critical defence-industry facilities from aerial and missile attacks.

Third, economic resilience complements military strength. Ukraine's defence effort depends on a robust economy and access to capital, supply chains, and export markets. Deeper EU integration, through trade facilitation, infrastructure links, and regulatory alignment, would strengthen these connections. The lapse of the EU's Autonomous Trade Measures (ATM) in mid-2025²⁸, along with the EU's delay in opening the first "Fundamentals" chapter of accession negotiations, constrains export revenues and delays needed reforms. Accelerating these processes, extending the Trans-European Transport Network (TEN-T), and supporting reconstruction loans from the EIB (European Investment Bank) and EBRD (European Bank for Reconstruction and Development) would help to sustain Ukraine's economic strength and recovery.

Finally, after a ceasefire, coordinated Black Sea monitoring and patrol missions by third parties will be needed to enforce maritime security. Given Russia's unchanged strategic ambitions, such missions must consist of or be backed by credible deterrence capabilities and demining efforts. Security guarantees at sea – whether through NATO arrangements, EU initiatives, or a dedicated maritime coalition – will be essential to deter further Russian incursions and protect Ukraine as well as other littoral states.

27 Interview with a military expert, June 2025.

28 The lapse of the EU's Autonomous Trade Measures (ATM) in mid-2025, which had temporarily removed tariffs on key Ukrainian goods, has left Kyiv without a comparable interim arrangement, constraining export revenues that once exceeded €24.5 billion annually. See European Commission, "[EU trade relationships by country/region](#)", accessed on 21 September 2025.

4.2 Reducing the dependencies and vulnerabilities of the littoral states

Regional stability depends not only on deterrence against Russian hybrid threats but also on identifying and addressing vulnerabilities that could be exploited through hybrid warfare. While every state in the Black Sea region has weak spots, this report focuses on those most susceptible to exploitation through hybrid warfare. Situated at the crossroads of strategic routes, these countries face both economic opportunities and external pressures, which can limit their freedom to shape independent foreign policies. Yet, with proper development and support, their untapped economic potential could strengthen regional deterrence.

Moldova

Moldova, though not a littoral state, illustrates this point well. Positioned as a transit country between Romania and Ukraine, the war has nearly dried up trade with Ukraine, one of its most important trading partners.²⁹ However, its infrastructure – roads, rail, and the small port of Giurgiulești – already helps to reroute Ukrainian exports. The EU’s “Solidarity Lanes” highlighted Moldova’s role when small Danube ports like Izmail became critical for grain shipments.³⁰ The future reconstruction of Ukraine will only increase Moldova’s strategic relevance, provided that EU investments in border improvements and connectivity with Romania reduce bottlenecks and tie it more firmly into European supply chains.

Russia’s invasion of Ukraine has turned Moldova into a strategic vulnerability for the EU. Moscow’s military presence in Transnistria, a narrow strip of land in the east, bordering Ukraine, Transnistria, and disinformation campaigns seek to destabilise the country’s pro-European government. However, the outcome of the recent parliamentary elections has demonstrated growing resilience against these efforts.³¹ A pro-Russian shift in Chișinău could threaten Odesa

29 Carolin Busch, “[War in Ukraine: Moldova to face severe economic shock. Macroeconomic Analyses and Forecasting](#)”, German Economic Team, March -April 2022.

30 Moldova is important for rerouting Ukrainian exports, as shipments from Odesa to Romania pass through Palanca. Border crossings are overloaded, prompting EU investments to expand capacity and strengthen overland infrastructure. Delegation of the European Union to the Republic of Moldova, “[EU invests 2.8 billion in 94 transport projects to boost sustainable and connected mobility across Europe](#)”, 3 July 2025.

31 Tim Lister, Kosta Gak, “[Moldova’s election delivers lessons to Europe on countering Russian interference](#)”, CNN World, 30 September 2025.

and southern Ukraine, while complicating Moldova's EU trajectory. Conditioning accession on Russian withdrawal risks granting Moscow a veto, but ignoring the issue raises doubts about Moldova's viability as a sovereign EU member. Transnistria's economy has collapsed after losing Russian gas subsidies, with industrial output down by over 50%.³² This raises questions about the region's future and possible reintegration. Such a process would demand political will in Chişinău and a clear EU strategy with sufficient funding, providing measures to address socio-economic pressures and ensure broad societal acceptance.

Figure 9 Moldova's Port of Giurgiuleşti³³



32 Jakub Pieńkowski, "Moldova and separatist Transnistria facing severe energy crisis", PISM, 28 January 2025. See also Marina Ohanjanyan, "Unfreezing Transnistria?", Clingendael Institute, 12 March 2025.

33 World Atlas, "Maps of Moldova", accessed on 22 September 2025.

Another aspect of vulnerability is connected to Moldova's public perception of its declared neutrality and weak defence posture. Public opinion often favours disarmament to avoid provoking Russia, leaving the responsibility for its deterrence to neighbouring Romania, even though Moldova has increasingly been a target of Russian hybrid threats, cyberattacks, and disinformation in recent years.³⁴ Many Moldovans rank the erosion of traditional values higher than the risk of military aggression.³⁵ This illustrates a gap between perception and reality – one that Russia exploits through disinformation. A broader societal shift is required: defence must be seen as a shared responsibility, not just external protection.

Bulgaria

Despite external threats, internal vulnerabilities may be equally destabilising. This is also the case for Bulgaria. Until recently, Moscow regarded Bulgaria as its most reliable partner in the European Union, largely due to Russia's grip on Bulgaria's energy sector, sympathetic political elites, and historical links that allowed Moscow to influence public opinion through disinformation. Long-term Gazprom contracts, the \$1.59 billion TurkStream extension, and strategic corruption gave Russia major leverage.³⁶ The 2022 Russian invasion of Ukraine changed this dynamic. Bulgaria condemned the invasion, declared Russia a threat to its national security, aligned with EU sanctions, expelled Russian diplomats, arrested officers for espionage, and provided military support to Ukraine. Moscow retaliated by cutting 90 percent of Bulgaria's gas supply and launching cyberattacks on its energy infrastructure.³⁷

Having joined Schengen in 2024 and aiming for Eurozone entry in January 2026, with OECD membership as a long-term goal, Bulgaria maintains a clear pro-Western course. Nonetheless, Russian disinformation continues to resonate, with public opinion on Eurozone accession being evenly divided. Meanwhile, some

34 Maksim Samorukov, "[In Odessa's Shadows: what is Russia's Strategy in Moldova?](#)", Carnegie Russia Eurasia Center, 9 October 2024.

35 International Republican Institute, "[National Survey of Moldova](#)", January- February 2024.

36 Valeri R. Ratchev, Todor Tagarev, "[Bulgaria's Black Sea Dilemma: NATO Ally or Russian Gateway?](#)", The Jamestown Foundation, 13 January 2022.

37 Andrew Higgins, Boryana Dzhambazova, "[Once Best Friends, Bulgaria Takes a Stand Against Russia](#)", The New York Times, 11 May 2022.

political actors with vested ties to Moscow have undermined political stability, resulting in seven parliamentary elections over three years.³⁸

Bulgaria nonetheless holds notable potential as a regional security contributor, particularly through its defence sector. Once the Warsaw Pact's main ammunition producer, Bulgaria's defence industry has grown by 200% since 2022, quietly becoming one of Ukraine's largest suppliers in the region.³⁹ Revenues from ammunition sales are used to modernise outdated capabilities, and plans are underway for drone production, new patrol vessels, and upgrades to the naval base in Varna to support NATO operations. Yet foreign investors remain cautious due to political volatility and doubts over whether funds will be properly managed.

Sofia remains committed to regional security. Beyond its role in the joint mine-countermeasure taskforce with Romania and Türkiye, supported by the Netherlands and Belgium, Bulgaria is seeking a larger role. Prime Minister Rosen Zhelyazkov recently proposed hosting a multinational maritime coordination centre in the western Black Sea. The centre would focus on surveillance, intelligence-sharing, and protecting undersea infrastructure, that could also help in monitoring a potential ceasefire.

To unlock its potential as a regional security contributor, several steps are important. First, more political attention from Brussels could help counter Russia's efforts to cast doubt within Bulgarian public opinion about ongoing reforms. Second, Bulgaria's own security contributions deserve recognition. While the EU's support for regional initiatives is valuable, priority should be given to strengthening local capacities, including the maritime domain or intelligence, surveillance, and reconnaissance (ISR) assets. Third, Bulgaria has the capacity to expand arms manufacturing to help NATO replenish ammunition stockpiles. However, domestic caution about raising its military profile, meant to avoid provoking Russia, has slowed progress. Despite this, the defence industry remains socio-economically important, employing more people proportionally than in many other EU countries. Bulgaria is also an important candidate for

38 Svetoslav Todorov, "[Bulgaria eyes eight back-to-back election as parliamentary crisis deepens](#)", BalkanInsight, 27 November 2024.

39 Antonia Kotseva, Krassen Nikolov, "[Bulgarian weapons exports up 200% since Ukraine war](#)", Euractiv, 18 July 2023.

EU investment in dual-use infrastructure in the region, as outlined in the EU Black Sea Strategy.

Georgia

Once a promising EU partner and reform frontrunner, with visa liberalisation and NATO- and EU-backed defence cooperation and investments, Georgia now shows little appetite for accession, having suspended the EU accession process until 2028. The European Council had already noted in its June 2024 Conclusions that Georgia's accession trajectory had been de facto halted.⁴⁰ European engagement has been eclipsed by growing trade with Russia after Western sanctions⁴¹ and exploratory deals with China. Georgia's GDP grew by 7.8% in 2023 and 9.4% in 2024.⁴² According to official data the EU remains Georgia's largest trading partner at 22.1% of total trade,⁴³ yet Kyrgyzstan has become the single largest export destination, likely through vehicle re-exports to Russia,⁴⁴ underlining how much the country has moved eastward. While framed as prudence to avoid provoking Russia, the Georgian Dream's approach primarily advances the ruling elite's economic interests and risks weakening Georgia's ability to maintain sovereignty over its foreign policy in the future.

For the EU, Georgia matters most in the Black Sea and Middle Corridor context, with the Global Gateway flagship initiative, the 1,195-kilometre Black Sea Submarine Cable (BSSC), connecting Azerbaijan, Georgia, Romania, and Hungary to diversify Europe's green energy imports,⁴⁵ and the Anaklia Deep

40 Delegation of the European Union to the Council of Europe, "[EU statement on Georgia](#)", 22 January 2025.

41 Georgia's reorientation is pragmatic rather than pro-Moscow. While Russia is accepted as a trading partner and bilateral trade has expanded sharply, public resentment of Russia's occupation of Abkhazia and South Ossetia remains strong, making open political alignment with Moscow untenable. At the same time China is making inroads through infrastructure and logistics, filling gaps left by Western hesitation. Zaal Anjaparidze, "[Georgia Remains Target of Attempted Russian Influence - Jamestown](#)", The Jamestown Foundation, 5 March 2025.

42 Trading Economics, "[Georgia Full Year GDP Growth](#)", accessed on 22 September 2025.

43 European Commission, "[Georgia](#)", accessed on 22 September 2025.

44 Sebastian Staske, "[Trade since the war in Ukraine: shifts likely to be temporal](#)", German Economic Team, July-August 2024.

45 Thijs Van de Graaf, "[Corridors of Power: The Black Sea Cable between Azerbaijan and Europe](#)", Brussels Institute of Geopolitics, October 2024.

Sea Port, intended to anchor Georgia in European trade routes.⁴⁶ A Chinese-Singaporean consortium now leads the Anaklia development after European bids were dismissed as unviable. The Western private sector, from Belgian dredgers to Dutch logistics companies, remains interested but cautious. APM Terminals could expand operations, but uncertainty and political opacity deter broader investment. In the meantime, logistical bottlenecks in the Middle Corridor – outdated infrastructure, inadequate warehousing, slow digitalisation – remain unresolved. These are precisely the areas where European firms could contribute, yet the government prefers short-term deals that maximise autonomy.

Figure 10 Proposed Black Sea Submarine cable⁴⁷



While high-level dialogue has been suspended since mid-2024,⁴⁸ some of the defence and security matters remain exempt. The country continues to host the EU Monitoring Mission (EUMM) along the boundaries with Abkhazia and

46 The West Wing, “[The Middle Corridor: Unlocking Opportunities for Dutch Enterprises](#)”, May 2025. See also Bob Deen, Wouter Zweers, “[The EU in the South Caucasus. Navigating a geopolitical labyrinth in turmoil!](#)”, Clingendael Institute for International Relations, March 2023.

47 Alexandra Heal and Anna Gross, “[EU plans Black Sea internet cable to reduce reliance on Russia](#)”, Financial Times, 12 May 2023.

48 Xandie Kuenning, “[Georgia to be excluded from EU meeting in September](#)”, OC Media, 6 August 2025.

South Ossetia and remains a NATO partner under the Substantial Package. However, Georgia is no longer a reliable partner on sanctions, cyber cooperation, or intelligence sharing.

EU candidate status remains Brussels' strongest anchor, but the government shows little interest in fulfilling its obligations, and conditionality tied to reforms has lost its effect. Still, the EU cannot completely disengage. Georgia's geographic position makes it key for Black Sea security, energy transit and sanctions enforcement. A return to values-based conditionality is unlikely to work in the current climate. Further disengagement would allow Moscow and Beijing to shape the region's economic and political landscape at Europe's expense.

The alternative is to maintain limited engagement where EU policy permits, while avoiding gestures that could be interpreted as political endorsement. Progress towards EU integration should continue to be assessed on a merit-based basis. This approach could be complemented by engagement with Georgia through individual member states rather than Brussels alone. Romania – with its strategic partnership with both Azerbaijan and Georgia – alongside Sweden and Poland, the initiators of the Eastern Partnership, could serve as credible intermediaries to maintain dialogue and influence.

4.3 Strengthening regional deterrence through a maritime coordination mechanism

When it comes to strengthening the deterrence of littoral states against hybrid threats from hostile state actors in the Black Sea, several challenges are best addressed at the regional level. These include vulnerabilities in critical energy and transport infrastructure, the lack of a comprehensive mapping of strategic assets, and continued dependence on U.S.-led intelligence networks.

Romania

This is visible in Romania, which has consistently been the most proactive NATO littoral state in advocating for deeper NATO and EU engagement in the Black Sea. Its urgency reflects intertwined security and economic concerns. Since Russia's 2014 annexation of Crimea, Romania's key air base and other military assets near Constanța have been within range of Russian air-defence and missile systems, while Moscow's ambitions to gain land access to Moldova threaten to expand its influence over a country that Bucharest considers strategically vital.

Russia's military activities also endanger commercial shipping, as drifting sea mines from military operations since 2022 have increased costs and risks for Romania's trade. Equally important, Romania seeks to protect its offshore natural gas resources, a pillar of its future energy independence.

Recognising its limited maritime deterrence, Romania aims to “internationalise” Black Sea security⁴⁹ by seeking active EU and NATO involvement, expanding regional infrastructure for military mobility, and investing in naval and mine-countermeasure capabilities. Romania's defence policy has been coherent since joining NATO in 2004, aimed at transforming a conscript-heavy force and outdated equipment, much of it predating 1991, into a modern, downsized force integrated with NATO and the EU, a process accelerated after 2014 by larger defence budgets.⁵⁰ Romania hosts U.S. forces under a 2005 agreement,⁵¹ contributes to NATO air policing over Romanian and Bulgarian airspace, and has welcomed four new NATO battlegroups since 2022. In 2023, the alliance incorporated the Black Sea into a regional defence plan, stationing about 1,800 U.S. Army soldiers—peaking at roughly 3,000 during 2022–23—while U.S. reconnaissance aircraft and drones have maintained an almost constant presence. This reflects Romania's ambition to become a backbone of deterrence and regional resilience in the region.

Romania and Bulgaria have urged Brussels to adopt a strategic Black Sea approach, and President Nicușor Dan has offered to host a proposed EU Black Sea maritime security hub. Announced in May 2025, the hub aims to pool data on regional monitoring,⁵² but its effectiveness will depend on strong intelligence, surveillance, and reconnaissance (ISR) capabilities. Romania has recently expanded its A2/AD capabilities, Bulgaria still operates with limited assets, and Türkiye currently supplies about 67% of the maritime situational picture.⁵³

49 Kamil Cașus et al., “[Romania, Bulgaria, and Türkiye in the Black Sea region: increased cooperation?](#)”, Ośrodek Studiów Wschodnich, 26 June 2025.

50 Siemon T. Wezeman, Alexandra Kuimova, “[Romania and Black Sea Security](#)”, SIPRI, December 2018.

51 U.S. Department of State, “[U.S. Security Cooperation with Romania](#)”, 20 January 2025.

52 Reuters, “[Romania wants to host planned EU Black Sea security hub, president says](#)”, 1 September 2025.

53 Yevgeniya Gaber et al., “[A sea of opportunities: exploring cooperation between Turkey and the West in the Black Sea](#)”, Atlantic Council Turkey Programs, October 2024; Serhat Güvenç, Mustafa Aydın, “[Between the Devil and the Deep Blue Sea](#)”, German Marshall Fund of the United States, 10 May 2023.

Additional EU assistance, such as support for procuring corvettes, frigates, and other naval assets, could help close the remaining gaps.

Domestically, Bucharest is expanding its Mihail Kogălniceanu base, expected to become NATO's largest European facility by the mid-2030s. Romania has also launched a corvette procurement programme and broadened mine-countermeasure capabilities. The Mine Countermeasure Black Sea Task Group, a trilateral Romanian-Bulgarian-Turkish effort which has been operational since early 2025, currently covers NATO members' waters, but could be expanded to Ukrainian waters after a ceasefire, providing a broader patrol mission.

All in all, Romania has the potential to serve as a central pillar within the EU framework for deterrence and regional resilience in the Black Sea. For the EU, this implies prioritising the development of transport links between Romania, Bulgaria and Türkiye to improve military mobility and create secure corridors, drawing on NATO's commitment to dedicate 1.5% of defence spending to dual-use infrastructure. Such investments would enhance regional connectivity and stimulate economic growth. Black Sea patrols could also be reinforced through the deployment of underwater drones, which offer faster and more cost-effective coverage than traditional corvettes or frigates, benefiting both Romania and Bulgaria. In addition, opportunities for closer cooperation with Ukraine on coordinated drone-patrolling operations merit further exploration.

Türkiye

Türkiye, as the region's strongest NATO member and the actor with the greatest leverage over Russia in the Black Sea region, has both the ability and ambition to take a leading role in regional security cooperation. However, Ankara's foreign policy priorities often diverge from those of the EU,⁵⁴ resulting in a strained relationship and limited progress towards an integrated Black Sea security framework for regional deterrence.

54 According to the European Commission, Türkiye and the EU share a very low convergence of views in foreign affairs, maintaining an average 10 percent alignment rate in terms of foreign policy priorities under the EU Common Foreign and Security Policy (CFSP): European Commission, "[Key findings of the 2023 report on Türkiye](#)", 8 November 2023.

Türkiye's strategy balances between East and West. On the one hand, Türkiye has confronted the Russian posture on multiple occasions,⁵⁵ maintains a strategic partnership agreement and defence industry cooperation with Ukraine and sustains good relations with Black Sea EU members. On the other hand, Türkiye does not fully comply with EU and US sanctions and, despite broader rivalries with Moscow in the South Caucasus, Libya, and Syria, views Russia primarily as an economic and energy partner and a competitor rather than a military threat, unlike Romania and Bulgaria. This calculation could shift if the war ends at Ukraine's disadvantage, expanding Russia's territorial footprint and raising the stakes for Türkiye.

In this context, Türkiye's role in enforcing the Montreux Convention⁵⁶ is particularly important. To safeguard a regional maritime balance and protect Ukraine's interests, the Straits would have to remain closed to all warships throughout the negotiation process and until a durable settlement is reached concerning the Ukrainian territories occupied by Russia.

President Zelensky's recent endorsement⁵⁷ of Türkiye's offer to assume a larger role in Ukraine's security guarantees, particularly overseeing the maritime component,⁵⁸ underscores a shift in Ankara's posture. Although Türkiye initially remained outside the early-2025 talks between Ukraine and selected EU-NATO members on deterrence support, it has signalled a growing willingness to be informed and involved. This reflects an evolution from Ankara's earlier focus on UN-led negotiations and a UN-mandated ceasefire mission in the Black Sea. By declaring its readiness to join Ukraine's security guarantees, Türkiye aims to reinforce its regional leadership, not only as a facilitator of Russia-Ukraine talks and Armenia-Azerbaijan talks,⁵⁹ but also as a NATO member and Western actor. Hosting next year's NATO Summit further underscores this ambition and offers an opportunity to explore renewed EU-Türkiye cooperation. Working

55 Giorgio Cafiero, "[Turkey and Russia Will Remain 'Frenemies' in Syria](#)", World Politics Review, 25 March 2025.

56 Yevgeniya Gaber, "[To help bring lasting peace to Ukraine, Turkey should enhance its cooperation on Black Sea security](#)", Atlantic Council, 14 July 2025.

57 Yuliia Taradiuk, "[Zelensky discusses security guarantees with Erdogan, says they'll be 'set out on paper next week'](#)", Kyiv Independent, 28 August 2025.

58 Newsroom, "[NATO calls for Türkiye-European Union rapprochement amid shifting ties](#)", Türkiye Today, March 2025.

59 Marina Ohanjanyan, "[Armenia and Azerbaijan: Peace or Pause?](#)", Clingendael Institute, 25 September 2025.

through individual EU member states that already maintain commercial and defence industry ties with Türkiye, such as Poland and Italy, might help to build momentum and mutual benefit.⁶⁰

Without Türkiye's capabilities, making the proposed EU Maritime Black Sea Security Hub fully functional will be difficult, as there is currently no comprehensive picture of activity in the region. For a regional monitoring and patrol mission to be effective, cooperation on sharing ISR data is essential. A detailed mapping of critical infrastructure – pipelines, radar facilities, seabed cables, and other key assets – is also needed to integrate regional security planning. This remains one of the most challenging tasks, given diverging strategic interests, the lack of trust, and a limited willingness to share sensitive intelligence.

4.4 Black Sea maritime coordination mechanism

The prospect of a Russia-Ukraine ceasefire has heightened the need for a coordinated regional monitoring mission and a reliable mechanism to verify compliance. For any ceasefire to hold, eyes on the Black Sea are crucial. Continuous monitoring is needed to discourage deniable acts, provide unbiased evidence to resolve disputes, and create a rapid-response mechanism for any incidents that might occur. It also discourages sabotage, the fourth step on the hybrid-warfare escalation ladder, by increasing the likelihood of detection.

Ceasefire monitoring needs to include a maritime force that is visible, has inherent and credible force and operates assets clearly linked to the mission of securing maritime infrastructure, including port facilities and key lines of communication. This force should be in direct contact with a regional maritime coordination centre representing all relevant parties to clarify incidents and reduce tensions before they escalate. A key factor is Türkiye's authority over

⁶⁰ Despite foreign policy differences, in the course of 2025 Türkiye's defence industry has already established a series of cooperation deals with European defence companies. In March 2025, for instance, Türkiye's Baykar and Italy's Leonardo took crucial steps in furthering defensive aviation cooperation. See also Sinem Adar et al., "[Alignment of Necessity: Turkey's Role in the Future European Security Architecture, SWP](#)", Stiftung Wissenschaft und Politik, 7 August 2025, and Mustafa Aydın, Aslı Aydıntaşbaş, "[Bridging the Bosphorus](#)", European Council on Foreign Relations, March 2025.

the Turkish Straits under the Montreux Convention, which affects the size and composition of any deployed maritime force.

A new ceasefire monitoring framework that builds on emerging and existing initiatives, such as the EU Maritime Security Hub and the Mine Countermeasure Black Sea Task Group, and actively links these initiatives to the extent possible, would enhance the collective security of all littoral states. Such a mission would have to integrate aircraft, UAVs, and ships, preferably from third-party nations acceptable for both Ukraine and Russia, work in coordination with the two belligerent nations and report to a joint coordination centre of the monitoring mission. Mine Countermeasures Vessels (MCMVs) are best suited for this: seaworthy, equipped for frequent route surveys, and devoid of any offensive capability, thereby reducing the risk of provoking either side. If threats arise, an air-defence frigate or destroyer could escort the MCMVs, provide a command platform, and manage air coordination without requiring a land base. While Black Sea states should ideally supply MCM units, their limited fleets mean that European partners will likely need to reinforce the mission. Together they can sustain an effective maritime monitoring operation.

Over 400 anchored and drifting automatic contact mines have been deployed by both Ukraine and Russia since 2022 to protect or prepare for attacks against port cities and disrupt each other's sea-based military operations.⁶¹ The presence of these mines has sharply increased regional insecurity due to surface vessel strikes, civilian deaths and rising insurance costs for maritime shipping.⁶² NATO member states Bulgaria, Romania and Türkiye have joined forces in a coordinated effort to address this security hazard through the establishment of the Mine Countermeasures Task Group Black Sea (MCM Black Sea). Since July 2024, the operation has deployed demining ships, patrol vessels, helicopters and drones from the three states involved.⁶³ A mine countermeasures effort, both sweeping and hunting, is required to ensure sustained safety for shipping. Initial efforts should focus on surveying and clearing agreed shipping lanes, eventually expanding to remove the mine threat entirely.

61 Daily Sabah, "[Sea mines drift into Turkish Black Sea coast near Istanbul](#)", 23 December 2024.

62 Ben Rothchild & Mark Jessup, "[Ukraine Symposium – “Damn the Torpedoes!”: Naval Mines in the Black Sea](#)", Lieber Institute for Law and Warfare at West Point, 2023.

63 UK Defence Journal, "[Demining the Black Sea](#)", July 2024.

Ceasefire monitoring must also be paired with credible deterrence. A Maritime Security Hub could function as a central pillar to track surface and subsurface activity, counter electronic warfare such as spoofing and jamming, and enable real-time intelligence sharing. Grounded in an assessment of current military capacity, EU capability targets, and required investments, such a hub would reinforce Europe's resilience and reduce the risk of Russian infiltration or hybrid attacks undermining the mission.

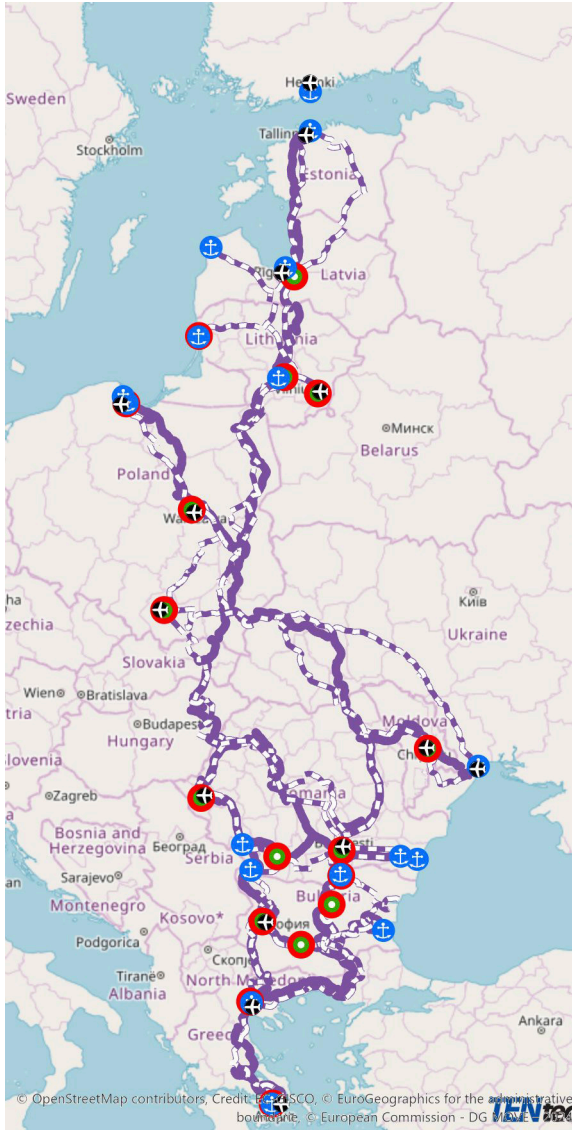
This maritime focus must be embedded in a wider Black Sea strategy that aligns with EU efforts to enhance North-South connectivity, particularly the Baltic-Black Sea-Aegean corridor and Corridor 8 linking the Black Sea to the Adriatic.⁶⁴ These routes require a military dimension, particularly an expanded rail capacity, to allow rapid reinforcement of NATO's eastern flank. The current infrastructure cannot support large-scale troop movements without significant U.S. assistance,⁶⁵ while funding for upgrades remains uncertain.

Coordinated investment planning among the littoral states, the EU, and NATO is therefore essential to identify and finance priority projects that advance both economic and defence objectives and align with the EU's broader strategic vision for the region.

64 Directorate General for Mobility and Transport, "[Baltic Sea – Black Sea – Aegean Sea corridor](#)", European Commission, accessed on 23 September 2025.

65 Martina Sapio, "[The US cavalry isn't coming: How Europe moves its armies without American assistance](#)", Politico, 23 April 2025.

Figure 11 The Baltic–Black Sea–Aegean corridor⁶⁶



66 EC-GISCO, “EuroGeographics for the administrative boundaries”, European Commission - DG MOVE, 2024.

Conclusions and recommendations

The Black Sea has emerged as one of Europe's most volatile security frontiers following Russia's full-scale invasion of Ukraine. This war has reshaped the region's strategic landscape and compelled the European Union to reconsider its role in regional security. As Russia assumes an increasingly disruptive and hostile posture, the littoral states that remain committed to the EU path are seeking ways to protect their economic and security interests by strengthening their own deterrence capabilities and exploring the EU's potential role as a security actor.

Given the limited economic, defence and ISR capacities of the individual littoral states – Bulgaria, Romania and Ukraine – the key question is how to coordinate their efforts to strengthen regional resilience. Equally important is defining the role of international actors, particularly the EU and NATO, in supporting these efforts. The prospect of a Russia-Ukraine ceasefire has further underscored the need for a coordinated approach to deter Russian hybrid threats effectively.

In May 2025, the EU launched a holistic Black Sea strategy that addresses security, connectivity, and economic prosperity. Central to the strategy are the EU Maritime Security Hub, strengthening defence cooperation, and fostering dual-use infrastructure in the region. The region matters to Europe for several reasons.

First, it hosts key infrastructure and transport routes, including gas pipelines, submarine electricity cables, grain export routes, and mining areas, and lies on major trade corridors connecting Asia to Europe through the Balkans and the Caucasus.

Second, Ukrainian and Russian grain exports underpin global food security, with direct effects on migration pressures towards Europe. And third, any further development of the region's hydrocarbon reserves could reduce Europe's dependence on Russian energy. Although its strategic relevance is primarily

economic for the littoral states, instability in the Black Sea can send global shock waves, driving up energy prices, causing food crises, and disrupting trade.⁶⁷

Russia understands this geography well. Its foothold on Ukraine's southern coast provides leverage over global grain markets, access to warm-water ports for power projection into the Mediterranean and the Middle East, and direct influence over EU energy supplies. Increasing digitalisation of maritime operations has introduced new vulnerabilities: cyberattacks can disrupt navigation, port operations, critical infrastructure, and naval systems, creating economic and strategic weaknesses that can be exploited in hybrid or coercive campaigns. At the same time, the maritime domain provides opportunities for plausible deniability in physical hybrid operations, as the principle of freedom of the seas allows actors to operate covertly while complicating attribution and response. Moscow's hybrid tactics, such as false-flag operations, cyberattacks, disinformation, and sabotage, allow it to exploit divisions among EU states and delay or fracture collective responses, even as its conventional military forces remain inferior to NATO's. These realities ensure that the Black Sea will remain strategically vital long after today's battles end.

Moscow behaves as a calculated, adaptive actor, moving up and down the spectrum of the hybrid-threat escalation ladder depending on how far the targeted state diverges from Russia's strategic objectives, the resistance it expects to encounter, and the anticipated cost of a response. To meet this challenge, the report argues that a multifaceted approach is needed to strengthen the resilience of littoral states – the EU members and candidates – across the full range of hybrid threats below the threshold of armed conflict, with several priorities for Europe and the littoral states.

Tilting the balance of power

The most urgent priority concerns maintaining Ukraine's maritime access, since its loss would threaten Kyiv's economic stability and shift the regional balance of power by giving Russia direct access to more than one-third of the Black Sea and positioning Russian military assets closer to NATO territories. Ensuring lasting access requires a combination of explicit guarantees for Ukraine's ports, sustained military and technological support, including drones and air-defence

⁶⁷ See also Clingendael CRU report: Jos Meester, Guido Lanfranchi, "[Food, power and politics. The political economy of wheat value chains in fragile settings](#)", Clingendael Institute, December 2024.

systems, and strengthened economic resilience through deeper EU integration and infrastructure investment. After a ceasefire, coordinated Black Sea monitoring and patrol missions, backed by credible deterrence and international security guarantees, will be essential to prevent renewed Russian aggression and protect the littoral states.

Addressing political and economic vulnerabilities in littoral states would decrease their exposure to external influence. Moldova's strategic transit role and internal fragilities, Bulgaria's energy profits dependence and evolving defence potential, and Georgia's pivot toward Russia and China – all illustrate how domestic and external pressures can limit these states' ability to contribute to regional security. Bulgaria's growing defence industry and Moldova's potential as a logistics hub highlight avenues for targeted EU investment and strategic support.

The EU-aligned states in the region – Bulgaria, Romania, Ukraine and Moldova – face multiple challenges, including vulnerabilities in critical infrastructure, limited situational awareness, and reliance on external intelligence networks, with Romania emerging as the most proactive NATO littoral state through expanded defence capabilities and efforts to “internationalise” Black Sea security. Türkiye's strategic position and enforcement of the Montreux Convention are crucial, as its cooperation will determine the effectiveness of coordinated maritime monitoring, patrols, and a proposed EU Black Sea Maritime Security Hub. Strengthening North–South connectivity, coordinating actions across the Black Sea and Baltic corridors, and sharing navigation and intelligence data are essential steps to reinforce NATO's eastern flank and safeguard commercial navigation in the Black Sea.

Stability in the Black Sea cannot rest on land-based measures alone. A permanent maritime security architecture is needed to monitor any ceasefire, safeguard commercial navigation, and counter hybrid threats. A new ceasefire monitoring framework that builds on emerging and existing initiatives, such as the EU Maritime Security Hub and the Mine Countermeasures Black Sea Task Group, and actively links these initiatives to the extent possible, would enhance the collective security of all littoral states. A dedicated monitoring mission, integrating aircraft, UAVs, and ships from third-party nations, could provide real-time intelligence to a joint coordination centre, enabling necessary coordination across this mosaic of political systems. Mine countermeasures vessels and naval drones, well suited for frequent route surveys and lacking offensive capability, would reduce escalation risks while keeping shipping lanes safe.

Recommendations for the European Union and the EU member states

1. Enhance integrated deterrence and defence:

- Develop an EU framework of hybrid-response measures that mirrors Russia's escalation ladder to counter disinformation, electronic warfare, and other grey-zone tactics.
- Ensure that any ceasefire or peace agreement guarantees Ukraine's right to operate Black Sea ports, supported by credible deterrence capabilities and long-term maritime security guarantees (EU, NATO, or a dedicated coalition).
- Provide sustained military and technological aid to Ukraine, including advanced anti-air missile systems, naval/submarine drones, and rapid-adaptation research funding.

2. Enhance the economic and political resilience of littoral states:

- Reduce political and economic vulnerabilities in Moldova, Bulgaria and Romania through EU trade facilitation, infrastructure investment, and regulatory alignment.
- Expand Bulgaria's mobility and explore investment in its defence industry and arms manufacturing capacity.
- Pursue a merit-based engagement with Georgia that preserves dialogue and cooperation on security and energy while avoiding political endorsement, using member-state partnerships to maintain influence and keep the path to eventual EU integration open.

3. Integrate Black Sea Strategy into wider EU connectivity plans:

- Embed the maritime security architecture within a broader EU strategy linking the Baltic, the Black Sea, and the Aegean, including Corridor 8 and other North–South transport routes.
- Prioritise funding for rail and port infrastructure to improve NATO reinforcement capability and regional economic growth, using the 1.5% defence spending target for dual-use projects.

4. Strengthen Black Sea regional maritime security:

- Establish a permanent maritime monitoring mission integrating aircraft, UAVs, and ships (preferably from third-party nations) to provide real-time intelligence to a joint coordination centre.
- Use mine countermeasures vessels as the core platform, with air-defence escorts as needed, to reduce escalation risks while keeping shipping lanes safe.

- Support Black Sea littoral states in creating a coordinated mapping of critical infrastructure (pipelines, seabed cables, radar installations) and enable ISR data-sharing among all Black Sea partners.
- Explore the possibility of a regional coordination mechanism with Türkiye to sharpen deterrence, improve ISR sharing, and ensure the functional operation of the EU Black Sea Security Hub.
- Obtain Türkiye's approval under the Montreux Convention for any maritime force and ensure that the Straits remain closed to all warships throughout the negotiation process and until a durable settlement is reached concerning the Ukrainian territories occupied by Russia.

5. Promote exchange of expertise and best practices among EU member states:

- Facilitate systematic knowledge-sharing between the Netherlands, the Nordic countries, and other EU member states that face similar maritime security challenges in the Baltic and North Seas. Their experience in governance, situational awareness, crisis management, and public-private collaboration can provide valuable lessons for the Black Sea region.
- Encourage the exchange of expertise on technology integration, infrastructure protection, and coordinated response mechanisms. Despite differences in regional contexts, sharing insights on hybrid-threat mitigation, maritime surveillance, and critical infrastructure defence can enhance resilience and preparedness across EU littoral states.
- Establish regular workshops, joint exercises, and cross-regional study visits to strengthen institutional knowledge, promote interoperable practices, and foster a network of maritime security experts capable of supporting both regional and EU-wide security objectives.