
Task Force Director and Primary Author: Richard D. Hooker, Jr.

Project Directors: Kimberly Talley and Anca Agachi
The Scowcroft Center for Strategy and Security works to develop sustainable, nonpartisan strategies to address the most important security challenges facing the United States and the world. The Center honors General Brent Scowcroft’s legacy of service and embodies his ethos of nonpartisan commitment to the cause of security, support for US leadership in cooperation with allies and partners, and dedication to the mentorship of the next generation of leaders.

The Transatlantic Security Initiative, in the Scowcroft Center for Strategy and Security, shapes and influences the debate on the greatest security challenges facing the North Atlantic Alliance and its key partners.

This publication was produced under the auspices of a project conducted in partnership with the National School of Political and Administrative Studies (SNSPA) on security in the Black Sea region.

December 2023

Cover photo: REUTERS/Bogdan Cristel.


This report is written and published in accordance with the Atlantic Council Policy on Intellectual Independence. The authors are solely responsible for its analysis and recommendations. The Atlantic Council and its donors do not determine, nor do they necessarily endorse or advocate for, any of this report’s conclusions.
A SECURITY STRATEGY
FOR THE BLACK SEA

“Russia’s war against Ukraine has fundamentally destabilized the Black Sea region.”

Acknowledgement ........................................................................................................................................ 2
The Strategic Goal ........................................................................................................................................ 3
The Strategic Setting .................................................................................................................................... 3
Regional Challenges and Threats ............................................................................................................. 8
Key Planning Assumptions .......................................................................................................................... 11
Risks and Risk Mitigation ............................................................................................................................. 11
Discussion and Recommendations ........................................................................................................... 14
Alternate Approaches ................................................................................................................................... 17
Conclusion ..................................................................................................................................................... 18
Endnotes ........................................................................................................................................................ 19
About the Authors ....................................................................................................................................... 24
Members of the Task Force ........................................................................................................................... 27
Timeline ......................................................................................................................................................... 28
The Atlantic Council thanks the National School of Political and Administrative Studies (SNSPA) for partnering in support of this work and for the support provided throughout the course of the task force’s deliberations.

The task force also thanks the Atlantic Council’s Eurasia Center, Europe Center, Global Energy Center, and Atlantic Council in Turkey for their valuable insights during the development and writing of this report.

This report is intended to live up to Brent Scowcroft’s standard for rigorous, relevant, and nonpartisan analysis on national security issues. The Atlantic Council’s Scowcroft Center for Strategy and Security works to continue his nonpartisan commitment to the cause of security, support for US leadership in cooperation with allies and partners, and dedication to the mentorship of the next generation of leaders.

The findings and recommendations in this report are the products of a task force of Atlantic Council experts acting in their own capacity and focused on developing actionable recommendations for enhancing the security and stability of the geopolitically vital Black Sea region. While the thrust of the report has been endorsed by all members of the task force, specific recommendations do not necessarily reflect the views of all task force members, the US government, the US Department of Defense, or additional organizations with which they are affiliated.
An unstable Black Sea region directly threatens the peace and prosperity of the North Atlantic community, a bedrock of US foreign policy since 1945. Russian aggression in the Black Sea region threatens the security of every Black Sea state and the Euro-Atlantic region as a whole, as well as global food security, international economic stability, and the viability of international legal frameworks. These represent key and important interests for the United States, as well as Europe. A comprehensive, long-term regional strategy to cope with this new reality is urgently needed. To be coherent, it must also be nested within a broader and viable transatlantic security architecture anchored in NATO. For the transatlantic community and the littoral Black Sea states, a desirable end state is a stable region anchored in the Euro-Atlantic community, where the sovereignty of Black Sea states is respected, international trade and commerce can flourish, and political resilience is enhanced. Getting there will require leadership, cooperation, investment, and persistence. Hard choices and a measure of boldness will be required.

The Strategic Setting

Overview

Since classical times, the Black Sea region has been a center of international trade and commerce, as well as a melting pot and transfer point for cultural exchange. In geostrategic terms, it served as a terminus for the Silk Road and an international crossroads, while the Bosporus and Dardanelles for centuries constituted one of the world’s most important maritime waterways. These factors made the region of strategic interest for the Greeks, the Scythians, the Persians, the Romans, the Huns, Byzantium, the Mongols, and the Seljuk, Ottoman, and Russian empires. Russia and the Ottoman Empire fought twelve wars across four centuries, largely over control of Crimea and the Black Sea, while England and France fought Russia over Crimea from 1853 to 1856 to prevent further Russian expansion in the region at the expense of a tottering Ottoman Empire.

Following the collapse of the Soviet Union, the Russian Federation under Vladimir Putin sought to reincorporate Ukraine into its territory and extend its dominance over the Black Sea region. Today, its control of Crimea and the northern waters of the Black Sea, although contested, gives it leverage over the Ukrainian, regional, and international economies, as well as strategic advantages for the projection of military force across the region. The states surrounding the Black Sea generate nearly $3 trillion in gross domestic product (GDP), include more than 300 million people, and “host assortments of interconnectors that facilitate trade and energy flows between Europe, Eurasia, and the Middle East, and globally beyond.” The Black Sea is a maritime conduit for much of the world’s grain supply, and the ongoing conflict in Ukraine has contributed markedly to rising prices for food, fuel, and fertilizer, with Russia’s invasion causing an “unprecedented shock” to the global food system. The Black Sea region is, thus, a critical geostrategic intersection between Europe and Asia with global importance. Instability in the Black Sea region is manifested by the fragility of its democratic systems, uneven economic performance, energy dependence, and open conflict.

Russia

With a warm-water port hosting the Russian Black Sea Fleet, Crimea represents a vital strategic interest for Russia. Following its occupation by Russian forces in 2014, Crimea has seen up to a million Russian immigrants, accompanied by the deportation or expulsion of much of the prewar
Ukrainian population. The Kremlin also poured more than $10 billion into Crimea to build up its civilian and military infrastructure, highlighted by the highway and railroad bridge connecting the peninsula with the Russian mainland over the Kerch Straits. Crimea today is heavily militarized, with strong ground, air, and naval units based there. Russia's Black Sea coastline stretches some 800 kilometers (km). Russian air-defense and surface-to-surface ballistic missile systems cover virtually all of the Black Sea region, while Russian leaders have moved nuclear weapons into Belarus and threatened to use them in the conflict. Russia's control of Black Sea shipping lanes allows it to interdict grain shipments from Ukraine, one of the world's largest providers, seriously affecting global food security.

More broadly, the Kremlin seeks to limit or prevent the closer integration of littoral states into Western economic and security structures, and aspires to dominate former territories. Moscow is determined not to cede occupied areas, as its possession ensures sea control over Ukraine's Black Sea coastline and serves as a launching pad for future advances on the Ukrainian heartland. Chinese and Indian trade has helped to offset Western sanctions, bolstering the Russian economy. More than 80 percent of Russia's 146 million citizens are ethnic Russians, with Armenians, Chechens, Tatars, and Ukrainians making up most of the rest. Russia's GDP of $1.8 trillion and defense budget of $66 billion are dwarfed by those of the United States ($23.3 trillion and $813 billion) and Europe (including non-European Union (EU) countries in Europe, some $18 trillion and $350 billion). Russian losses in the war to date have been enormous, and the stability of the Russian regime has been threatened by Yevgeny Prigozhin's June 2023 aborted coup, but Putin remains determined to carry on the conflict.

**Ukraine**

For its part, Ukraine is heavily dependent on its Black Sea territories and has suffered cruelly from Russian aggression there. Along with the loss of its surface navy in 2014 and the forced deportation and dispossession of its population in Crimea, Ukraine's economy was badly disrupted following the February 2022 invasion. With a coastline of some 1,300 km, Ukraine is one of the world's largest grain exporters and depends on commercial transit across the Black Sea. In 2022, Ukrainian grain exports fell by 30 percent, with a projected loss for 2023 of 24 percent. Overall GDP fell by 29.1 percent. Shipping
disruptions have caused grain supplies to move to Poland and Hungary, depressing local farm prices and provoking commodities bans even among close allies. The United Nations Black Sea Grain Initiative, an agreement brokered by the United Nations (UN) and Turkey, partially eased these losses, but Russia abrogated the deal in July 2023 and remains largely in control of Ukrainian exports across the Black Sea. Of Ukraine’s prewar population of 41.5 million, ethnic Ukrainians made up three-quarters of the population, while Russians were less than one-fifth. The remainder were Belarusians, Moldovans, Bulgarians, Poles, Hungarians, Romanians, Roma, and Crimean Tatars. Ukraine has experienced a severe loss of population due to the war, with 5.8 million refugees and another 3.7 million forced to relocate inside the country, while its infrastructure has been badly damaged.

Western aid, a strong performance by Ukrainian forces, a resolute Ukrainian population, and excellent use of both advanced and older-generation capabilities underpin Ukraine’s successful defense, but recovering its occupied territories is more challenging without further advanced capabilities, such as combat aircraft and long-range rocket artillery. Economically and from a security standpoint, Russia’s continued occupation of Crimea leaves Ukraine a divided state, always under threat and shorn of one of its most important economic pillars.

Turkey

As a major regional partner controlling access to the Black Sea through the Bosphorus and Dardanelles, Turkey plays a significant role in regional security. The second-largest military power in NATO, Turkey’s 775,000-strong armed forces include 1,900 tanks, 3,100 artillery systems, 850 aircraft, and ninety-two ships. The strongest power in the region outside of Russia, Turkey has an extensive Black Sea coastline stretching 1,329 km. Its $820-billion GDP, large population of eighty-five million people and powerful military give it impressive stature and influence in the Black Sea region. Turkey spends $16 billion, or 2.06 percent of GDP, on defense, well above the NATO average. However, in recent years, Turkey has suffered from runaway inflation and lowered living standards, circumstances that have challenged the ruling Justice and Development Party, whose victory in May 2023 presidential elections has nonetheless showcased its staying power. Both the United States and the EU have imposed economic sanctions on Turkey, contributing to a history of anti-United States and anti-EU attitudes among some of the Turkish population.

In power since 2003 (first as prime minister and then as president), Recep Tayyip Erdogan has leveraged Turkey’s geostrategic position to emerge as a broker in the Ukraine conflict, balancing between NATO and Russia. Erdogan maintains a credibility with Putin unique among NATO leaders because of a shared resistance to what they view as Western meddling in internal affairs. Although Turkey condemned the invasion and provided the Bayraktar TB2 drone to Ukraine, it has not joined in sanctioning Russia—and, in fact, doubled its imports from Russia in 2022 (in part due to inflation), an economic relationship sustained amid financial turbulence in both countries. Turkey also imports almost half of its natural gas from Russia through the Bluestream and Turkstream pipelines across the Black Sea. Turkey is a regional energy actor in its own right due to its own Black Sea gas reserves, its role as a bridge for Azerbaijani gas, and its swap agreement with Bulgaria. Although sympathetic to the plight of Crimean Tatars, Erdogan is mindful of the Ottoman Empire’s difficult history with Russia and of his economic dependence on Russian energy and tourism. He meets regularly with Putin and has on occasion criticized European leaders for “provoking” the Russian leader. Turkey’s acquisition of the Russian S-400 air-defense system has angered successive US administrations, leading to its removal from the F-35 program. Turkey, like many other countries, maintains significant economic ties to China, with $23 billion in bilateral trade annually. Erdogan was narrowly reelected in May 2023, and his history suggests he will likely maintain an approach to both domestic and external affairs that many NATO allies view as challenging, although some of his recent government appointments are considered more moderate. Overall, however, while a fractious ally, Turkey is seeking regional stability and is not a principal contributor to Black Sea insecurity.

Romania

Romania has a 245-km Black Sea coastline and a GDP of $285 billion, casts a wary eye on Russian aggression in the region, and has raised Black Sea security continuously since 2014 in NATO circles.
Less than 400 km from Sevastopol, Romania is a frontline state bordering Russian air and maritime forces; its aircraft are within range of Russian air defense upon takeoff. With a current defense budget of some $6 billion and defense spending at 2.5 percent of GDP, it has increased defense spending substantially each year since 2016, but still relies on NATO security guarantees to offset Russian aggression in the region. Claiming territorial waters out to 12 miles and an exclusive economic zone to 200 miles, Romania fields modest air and naval forces, although its army can field four hundred tanks and 1,200 artillery pieces. Force modernization is well under way; Romania currently fields a squadron of F-16s and small numbers of Patriot air-defense systems, HIMARS launchers, Piranha armored personnel carriers, and Turkish and Israeli unmanned aerial vehicles (UAVs). Current plans call for Romania to procure more F-16s and Patriot launchers, fifty-four 155-milimeter (mm) self-propelled artillery howitzers, 298 infantry fighting vehicles, and fifty-four US Abrams main battle tanks. Current plans call for Romania to procure more F-16s and Patriot launchers, fifty-four 155-milimeter (mm) self-propelled artillery howitzers, 298 infantry fighting vehicles, and fifty-four US Abrams main battle tanks. A five-thousand-man NATO brigade (Multinational Brigade Southeast) built around Romanian troops with some augmentation is stationed in Craiova, while a US combat brigade was deployed to Romania following Russia's invasion of Ukraine. Romania's modest 6,500-strong navy is based at Constanta, the largest EU port on the Black Sea, and in Mangalia near the Bulgarian coast. In 2015, the US Aegis ballistic-missile defense system was fielded at the Romanian air base at Deveselu. NATO forces also provide air patrols to help secure Romanian airspace.

Had Russia succeeded in overrunning Ukraine in the spring of 2022, Russian forces would have been situated on the Romanian frontier. With a population of nineteen million and large, untapped energy reserves on its seabed, Romania is largely energy independent, providing most of its own energy needs through a combination of domestic oil, natural gas, coal, hydroelectric, and nuclear power. Ethnic Romanians comprise almost 90 percent of the population, while 6.5 percent are Hungarians. Continued stationing of NATO troops and improved coastal defenses—above all, anti-ship missile systems and air defense—constitute Romania's most urgent security needs. Increasingly prosperous and firmly embedded in NATO and the EU, Romania is staunchly pro-Western and a stable anchor in the region.

**Bulgaria**

Like Turkey, Bulgaria is largely dependent on Russian energy and trade. One of the poorest countries in Europe, with a GDP of $84 billion and seven million citizens, Bulgaria is challenged by a declining population, endemic corruption, poor infrastructure, and high indebtedness on the part of state-owned businesses, especially in the energy sector. Although Bulgaria is a member of NATO and the EU, pro-Moscow elements in its governing coalition have sought to prevent Bulgaria from providing meaningful support to Ukraine even as it has armed Ukraine quietly. The pro-Moscow elements have also tried to ensure continuing dependence on Russian oil and gas, even as Russia abruptly cut off gas exports to Bulgaria in the spring of 2022. Bulgarian politics remain unstable, with a significant part of Bulgaria's civil population maintaining a cautiously favorable attitude about Russia, though the invasion of Ukraine has shaken this trend. Poised between Europe, Russia, and Turkey, Bulgaria must balance these perspectives and navigate cautiously. Corruption, indirect Russian influence, and military weakness relative to its neighbors all complicate Bulgarian security planning, which is above all based on NATO's Article 5 guarantees. While the country has 378 km of Black Sea coastline, and defense spending of 1.7 percent of GDP, the Bulgarian military includes fewer than one hundred tanks and fifty combat aircraft. In February 2022, NATO pledged to field a multinational battlegroup of 1,500 soldiers in Bulgaria. As in Romania, coastal and air defenses are urgent priorities. Eighty-five percent of Bulgaria's population are ethnic Bulgarians, with about ten percent of Turkish origin.

**Moldova**

With a shared history and culture, the Republic of Moldova has a special relationship with neighboring Romania. Like its neighbors, Moldova finds itself a target of Russian imperial ambitions as a former part of the Russian empire. Russian troops have garrisoned Transnistria, essentially the Dniester River valley in the northeast part of the country, ever since intervening in the Transnistrian War in 1992. They are backed by Transnistria's 5,500 active and twenty thousand reserve troops, all poorly trained and equipped. The region remains sovereign Moldovan territory under international law, but is a de facto breakaway Russian statelet like Abkhazia in Georgia. (Russia firmly pledged to withdraw these troops on several occasions, but those pledges were never honored.) The Cobasna ammunition depot,
located in Transnistria, is the largest in Europe and stores twenty thousand tons of ammunition left in place when the Soviet 14th Guards Army departed after the collapse of the USSR. Moldova has a tiny GDP of $14 billion (0.41 percent of which is spent on defense) and a population of 3.3 million, while its military totals 6,500 troops equipped with dated Soviet-era equipment. Its greatest security concern is the threat of a Russian land bridge through Odesa and southern Ukraine connecting with Transnistria. Heavily dependent on imported Russian energy before the war, Moldova has pivoted to neighboring Romania as its energy provider. The European Council decided to open accession negotiations for EU membership for Moldova in December 2023, even as there exists significant pro-Moscow sentiment in some areas, such as Gaugazia. Russian attempts to destabilize Moldova’s staunchly pro-NATO, pro-EU government remain a real threat, despite determined efforts at pushback by President Maia Sandu. Moldova has no Black Sea coastline except for the small international river port of Giurgiulești on the Danube. About three-fourths of Moldova’s population are ethnic Moldovans, with smaller populations of Romanians, Ukrainians, Russians, Gagauz, Roma, and Bulgarians.

Georgia

Like that of others in the region, Georgia’s security is inextricably bound to the threat from neighboring Russia. To prevent Georgia’s closer integration with the West following the 2003 Rose Revolution and 2008 Bucharest Summit declaration that Georgia and Ukraine would eventually become members of NATO, Russian forces invaded in the fall of 2008 and continue to occupy 20 percent of Georgia’s landmass in the regions of Abkhazia and South Ossetia, depriving Georgia of two-thirds of its Black Sea coastline. Largely dependent on foreign energy, Georgia imports most of its needs from readily available, cheaper Azerbaijani reserves. However, Russian involvement in the Georgian economy has spiked since the invasion of Ukraine, raising Georgia’s dependence on Russia to alarming levels. The current government is dominated by the Georgian Dream party, which many critics in Georgia, Europe, and the United States believe is sensitive to Moscow’s alignment against the West. Georgian Dream continues to court Moscow despite overwhelming popular support in Georgia for greater relations with the West, particularly the European Union. While Georgia has been a NATO partner since 1994, its accession to NATO was deferred indefinitely. This encouraged pro-Moscow political forces, although the civilian population continues to support both NATO and EU membership. The European Council in December 2023 granted candidate status to Georgia in line with the European Commission’s recommendations from November 2023—a major development for pro-Western forces in Georgia. About four-fifths of the population of Georgia are ethnic Georgians; the rest are Armenians, Russians, and Azerbaijanis, with smaller numbers of Ossetians, Greeks, Abkhazians, and others. Russia’s economic isolation due to sanctions has amplified the importance of other oil pipelines transiting Georgia. If completed, the long-proposed deep-water port at Anaklia could promote Georgia as a regional logistics hub and encourage foreign investment. With a GDP of $19 billion, a population of four million, and a small but experienced military with fewer than forty thousand soldiers, 134 operational tanks, 150 artillery pieces, and eleven combat aircraft, Georgia spends 1.7 percent of GDP on defense. It faces a serious conundrum: it must garner security guarantees from NATO and more powerful neighbors, or accommodate Russia.

China

As an extension of its Belt and Road Initiative (BRI), China has deepened its investment and diplomatic presence in the Black Sea region in recent years, opening new markets and building infrastructure to connect with Europe and the Middle East. It has also propped up the Russian economy since the invasion; overall trade between Russia and China increased by 30 percent in 2022, oil sales by 45 percent, coal purchases by 54 percent, and natural-gas sales by 155 percent. During the conflict, China has pressured Russia to honor the Black Sea Grain Initiative (China is the major beneficiary of the deal), criticized Russian nuclear threats, and withheld arms deliveries to Russia. After an initial surge beginning in 2000, Chinese foreign direct investment has fallen off and several high-profile initiatives, such as a joint project to build nuclear reactors in Romania, have been curtailed. Its military presence in the region is negligible, while intense East-West competition and US pressure on littoral states have prevented close economic ties. China has not prioritized the region and, at the present time, is not a major player in Black Sea regional dynamics. That could change, but for now China has other, higher priorities.
Overview

Black Sea states are principally challenged by Russian malign activity, energy dependence, political fragility, and economic underperformance. Previous attempts to solve regional disputes and address security threats through diplomacy—via the Organization for Security and Co-operation in Europe (OSCE), the Organization of the Black Sea Co-operation (BSEC), the 1994 Budapest Memorandum, the 2008 Bucharest Summit Declaration, Minsk I in 2014 and Minsk II in 2015, the Normandy format, and various bilateral diplomatic overtures, among others—all failed due to Russian intransigence and territorial ambitions. Opportunities exist for stabilizing the Black Sea region and improving the economies and political stability of Black Sea states, but most require amelioration of the Russian threat. Until then, the Black Sea will remain a conflict zone and progress will remain elusive.

Russian malign activity

As of 2023, Russia maintains a military presence in Ukraine, Georgia, and Moldova that promotes instability and provides leverage for subversion and disinformation. Most of Russia's ground forces are deployed in Ukraine, along with sizable national-guard units for occupation duties. The Russian Black Sea Fleet has largely withdrawn from its historic base in Sevastopol in Crimea to Novorossiysk, due to Ukrainian missile and drone attacks. Since the loss of the flagship Moskva in April 2022 and the sinking of several other ships due to Ukrainian anti-ship missiles (in addition to damaging attacks on fleet headquarters and naval aviation bases in Crimea), the fleet has remained largely at anchor, although occasional Kalibr missiles have been launched from submarines. Despite heavy manpower and equipment losses, Russia retains control of most of the Donbas and Crimea, while Putin seems determined to continue the conflict and weaken Ukrainian and Western resolve.

In Georgia, 4,500 Russian soldiers and border guards are based at Gudauta in Abkhazia and Tskhinvali in South Ossetia (although some units were redeployed to Ukraine to replace losses). Another 1,500 are based in Transnistria, the breakaway Moldovan statelet. In each case, local conscripts provide the bulk of forces, led by Russian officers and augmented by small separatist forces armed and equipped by Russia. The presence of Russian troops serves to prevent reintegration of occupied territories, promote separatist movements and narratives, intimidate host-nation governments and their armed forces, and inhibit integration with the West.

The Russian military is far from the only threat. Russian malign activity—propaganda, disinformation, and subversion—is directed against all Black Sea states, with varying degrees of success. A regular tactic is sponsorship and funding of pro-Moscow, anti-Western parties, politicians, and movements through front companies, offshore accounts, and funneling of money to media and public-opinion influencers. Outright bribery and corruption feature prominently. Cyberattacks, particularly against energy infrastructure, are frequent and effective. Countering Russian hybrid approaches must, therefore, be central to any regional strategy.

Energy dependence

Across the Black Sea region, as in Europe, Russia has used energy dependence as both a tool and a weapon to pressure and influence its neighbors. The war has weakened that weapon substantially. Following the occupation of Crimea in 2014, Ukraine ceased its imports from Russia and now relies on imports from Central and Eastern Europe. Russian attacks on Ukraine's energy infrastructure have damaged, but not crippled, its capacity. Romania is largely insulated from dependence on Russian energy through a combination of domestic production of natural gas (Romania is the European Union's second-largest producer), renewables, hydropower, and nuclear power. Romania is also investing in small modular nuclear reactors and is conducting feasibility studies on an underwater interconnector for transporting green energy from Azerbaijan to Hungary. Before Russia's invasion of Ukraine in 2022, Romania imported 30 percent of its oil from Russia, but today it imports from Kazakhstan, Azerbaijan, and Saudi Arabia instead.

Turkey benefits from buying cheap Russian oil, refining it, and selling it on the world market at higher
prices.66 Forced to import more than 90 percent of its energy needs, Turkey has increased its energy reliance on Russia significantly since February 2022.67 Although alternate energy sources are readily available, for now Turkey continues to exploit its favored trade relationship with Russia in the energy sector. Through its control of the Bosporus, Turkey can deny passage of liquified natural-gas (LNG) ships on security grounds, contributing to the absence of an LNG terminal in the Black Sea.68

Moldova, Bulgaria, and Georgia are also heavily dependent on imported energy. Moldova has struggled to wean itself following Russian cutoffs and price increases following the invasion of Ukraine and is pursuing alternatives, principally through Azerbaijani and Romanian energy supplies.69 Through early 2022, Bulgaria imported 77 percent of its natural gas from Russia, which also owned Bulgaria’s only oil refinery. Following the April 2022 cutoff by Gazprom, Bulgaria has also pivoted to Azerbaijani energy running through Turkish and Greek pipelines.70 Its local nuclear and coal resources offset the need for imported natural gas, even as gas is still fueling important parts of the economy. Georgia is almost 100-percent dependent on imports for natural gas—its main energy source—obtained primarily from Azerbaijan, while its dependence on Russian energy is modest (though spiking substantially from 2018 to 2022).71 Overall, the war in Ukraine has spurred energy independence from Russia across the region, except for Turkey. If exploited, Black Sea energy reserves have the potential to free the region from dependence on Russia altogether, making the Black Sea a major energy hub.72

**Economic underperformance**

Uneven economic growth and lower standards of living continue to affect Black Sea states, contributing to instability. Endemic corruption, a legacy of the Soviet and Warsaw Pact era, is persistent and
difficult to eradicate. While Romania and Bulgaria are EU members, all Black Sea states except Turkey are excluded from the Organisation for Economic Co-operation and Development (OECD), while only Bulgaria and Romania are members of the Three Seas Initiative. Therefore, Moldova, Georgia, and Ukraine suffer from a lack of economic integration with the West.

Russia’s economy shrank by 2.5 percent in 2022 due to global sanctions, capital flight, and a drop in exports—a much better showing than expected. $300 billion of Russia’s central bank reserves—almost half of the total—are held by entities participating in sanctions (the United States, the United Kingdom (UK), Japan, Canada, and the EU) and sequestered. Still, Russia is energy and agriculture independent and, in the words of one expert, its economy “will take a lot of killing.” Russia will not be an economic powerhouse for decades, if ever, but as a strongly centralized autocracy with vast natural resources, its economy has shown resilience under stress.

Ukraine’s economy has contracted by approximately one-third due to Russian aggression on its territory, though Western aid has partially offset these losses. Its armed forces, infrastructure repair, and displaced population require financial support that might otherwise go to economic development. The completion of Nord Stream 2 threatened to deprive Ukraine of up to $3 billion per year in lost transit fees. Should the war evolve into a protracted frozen conflict, Ukraine’s economy will suffer more negative growth and will require extensive foreign assistance. Without massive external help, Ukraine’s post-conflict reconstruction needs will also serve as a brake on economic growth.

Turkey’s economic problems are also serious, with inflation projected at 58 percent for 2023, exacerbated by rising commodity prices linked to the conflict in Ukraine. The catastrophic earthquakes of February 2023 and the costs associated with hosting millions of refugees from the Iraq and Syrian civil wars have worsened the economic crisis. War in Ukraine has also hampered the economies of Moldova, Bulgaria, and Georgia, which number among Europe’s smallest. Moldova ranks fortieth of forty-four countries in Europe in economic freedom, with “below potential” economic performance and weak rule of law hindering economic development. Bulgaria has seen slowed economic growth following the invasion of Ukraine due to rising energy costs and high inflation, while structural reforms to improve investor confidence and the overall economy are needed. Georgia’s economy faces similar structural problems; 53 percent of its citizens live in poverty, while weak productivity and limited human capital work against strong economic growth. In recent years, Georgia’s GDP grew by about 4 percent annually, but high unemployment and inflation approaching 11 percent in 2022 hindered a rise in the standard of living, along with a radically unequal distribution of wealth.

Fragile democracies

The journey toward stable, functioning democracy and the rule of law has been a challenging one for most of the Black Sea region. Corruption, bureaucratic inefficiency, intra-regional conflict, and the lack of democratic political culture have all hampered the pace and scale of democratic transition, a process opposed by Moscow through both direct and indirect means. EU member status has helped Romania and Bulgaria by incentivizing progress toward democratic institutions and processes, although both remain outside the EU Schengen Area. The European Council decided to open accession negotiations with Moldova and Ukraine and award Georgia with candidate status. Turkey is a special case; EU membership has been stalled for years because of uneasy relations between Ankara and Brussels, watering down these incentives and limiting EU influence. While a multiparty system still exists, suppression of journalists, politicization of the courts, erosion of the rule of law, and consolidation of power in the president’s office have all moved Turkey away from the path of liberal democracy.
Key Planning Assumptions

In the absence of certainty, a sound strategy depends on accurate planning assumptions. For the Black Sea region, the following assumptions support this strategy. As events unfold, policymakers should constantly revisit their assumptions at critical decision points.

- Strong US leadership will be needed to achieve stability and security in the Black Sea region, with NATO and the EU as key actors.
- The conflict in Ukraine, if allowed to degenerate into a frozen conflict, will encourage instability, disruption of trade, and the threat of further Russian military aggression.
- A strategy for Black Sea security should be nested in a broader European security architecture, with NATO as the foundation.
- Russian strategic objectives reach beyond Ukraine; Putin seeks to confront NATO and recover former Russian territories where possible and weaken the Alliance from within.
- The interdiction of Ukrainian grain and other agricultural products in the Black Sea will continue to disrupt the Ukrainian, regional, and global economies, contributing markedly to an international food crisis.
- For littoral states, energy independence from Russia is critical to forming more stable security arrangements.
- Foreign investment in the Black Sea region will require security guarantees (NATO or bilateral) and a predictable and transparent business environment to assure return on investment.
- Economic progress and an increase in standards of living are needed to stabilize weaker littoral states politically.
- Stability in the Black Sea region will require active and coordinated measures to defeat Russian subversion and disinformation.
- Turkey will likely remain a difficult, though critical, ally, and will seek to balance between Russia and the West while Erdogan remains in power.

Risks and Risk Mitigation

The most serious risk with respect to the Black Sea region is Russian escalation in response to more aggressive Western sanctions, military support, or military action. Escalation can take many forms, including a complete cutoff of energy supplies to Europe, more serious cyberattacks, greater restrictions on both Russian and Ukrainian exports of grain and other commodities like fertilizer, attacks on underwater pipelines and telecommunications cables, more severe missile attacks on Ukrainian urban and infrastructure targets, horizontal escalation, and—most serious of all—use of nuclear or chemical weapons.87

All forms of escalation, however, carry risks for Putin's regime, and none offer the promise of a decisive, positive outcome. Europe has made progress in weaning itself from Russian energy, and a complete cutoff by Russia would diminish a major source of income during a time of serious economic distress. Increased pressure on grain shipments can generate leverage for Russia, but it also contributes to further diplomatic isolation and the development of alternate sources of supply. Offensive cyberattacks against Western powers might be painful but would provoke instant, and probably unbearable, cyber retaliation.88 Russia is already pounding Ukrainian cities with long-range missile attacks, but its stock of precision-guided weapons (above all the Kalibr) is rapidly dwindling with little hope of resupply, while Ukrainian morale and basic services remain intact.89

The greatest fear—Russian use of nuclear weapons—has been threatened on multiple occasions by the country’s leaders. That use might include detonation of one or several tactical nuclear weapons in an effort...
to “escalate to de-escalate” the Ukraine conflict. Nonetheless, any nuclear use by Russia would entail major consequences for Moscow. It could lead to direct NATO involvement on the ground, at sea, and in the air; the imposition of the fullest range of harsh economic sanctions; offensive cyber operations targeting critical Russian nodes and government operations; loss of support from China, India, and other key powers; focused retaliation, such as the destruction of the Black Sea Fleet; large-scale provision of systems and munitions (HIMARS/MLRS, ATACMS, main battle tanks, combat aircraft) hitherto denied or restricted; large-scale, direct attacks by Ukrainian forces on Russian soil; and other severe measures. On balance, the probability that Russia will employ nuclear weapons is less likely than not, given the severity of expected responses, the risk of uncontrolled escalation, and Chinese reaction. Strategic nuclear deterrence has held firm for many decades and remains grounded in the prospect of immediate retaliation with unacceptable levels of destruction. Absent a direct threat to the survival of the state, Russian leaders should be deterred from running these risks in Ukraine.

Horizontal escalation outside the Black Sea region is also possible, but not likely. Almost all of Russia’s land forces are engaged in Ukraine, and any attack on NATO territory will draw the Alliance into the conflict directly. Russian resources, both financial and military, are overstretched and cannot be ramped up for major operations elsewhere. Extending the conflict beyond the Black Sea region would also bring powerful military forces to bear against Russia at other key points on its periphery, without corresponding gains.

On other fronts, Putin may hope to fracture NATO and EU cohesion by exploiting fissures in the Alliance’s approach to Black Sea issues. Currently, the Baltic states, the Nordics, the UK, Romania, and Poland support stronger responses to Russian aggression in the Black Sea region and are more receptive to expedited accession pathways for Black Sea states. The United States, Turkey, France, Italy, Germany, and the EU, along with some other countries, oppose “fast-track” membership and some are more open to a negotiated settlement that might leave Russia in possession of some Ukrainian, Moldovan, and Georgian territory. Over time, donor fatigue and in possession of some Ukrainian, Moldovan, and Georgian territory. Over time, donor fatigue and in possession of some Ukrainian, Moldovan, and Georgian territory. Over time, donor fatigue and in possession of some Ukrainian, Moldovan, and Georgian territory.

Relatedly, leadership changes among key NATO and EU nations might also fracture Western unity. Should a more isolationist president take office in 2025, US support for Ukraine and the Black Sea region could be adversely affected. The collapse of coalition governments in Germany and Italy, or the accession of pro-Moscow leadership in Moldova, Georgia, or Bulgaria are other examples. Regime collapse in Russia is also possible, with consequences that could either soften or harden Russian behavior in the region. While common interests and common values will remain the foundation of transatlantic relations, abrupt course changes could follow future electoral outcomes and should be considered.

Mitigating these risks rests, first and foremost, on both nuclear and conventional deterrence. The 2022 US Nuclear Posture Review reaffirmed that a “safe, secure, and effective nuclear deterrent undergirds all U.S. national defense priorities,” and supported upgrades to the nuclear triad. NATO’s Dual- Capable Aircraft (DCA) program combines trained aircrew, tactical aircraft capable of delivering nuclear munitions, and US-provided B-61 series nuclear gravity bombs stored in several NATO countries to provide deterrence options below the strategic threshold. France and the UK also possess small numbers of strategic nuclear weapons. Together, these components represent a survivable, flexible nuclear capability with both strategic and tactical components that can deliver massive retaliation after an attack, ensuring a stable nuclear deterrent.

Conventionally, the NATO Alliance possesses far greater military strength than Russia, though readiness and interoperability are concerns. Following Russia’s invasion of Ukraine in February 2022, sizable NATO ground forces were deployed to the eastern flank (including Romania and Bulgaria), although air and naval forces have not been materially increased. High Russian losses mean that further military aggression in the Black Sea region is less likely in the near future, though subversion and hybrid activities will continue. While Russia retains control of Crimea, Transnistria, Abkhazia, and South Ossetia, instability in the Black Sea region will persist. For the near to middle term, NATO ground forces deployed to the region should deter Russian aggression, while security assistance to threatened Black Sea states can help them both deter and defend themselves should deterrence fail.

In selecting options to stabilize the Black Sea region, decision-makers should manage risk and balance the desire for concrete and positive outcomes
with the need to preserve Alliance unity and avoid escalation across the nuclear threshold. Here the right mix of firmness, boldness, and discretion will be key. This suggests that introducing NATO ground troops into the conflict, or actions directed at regime change or the dismemberment of the Russian state, go too far. A Russian military failure in Ukraine presents opportunities to solve a range of regional security issues by leveraging sanctions relief and reintegration into the global economy in exchange for removal of Russian forces from occupied territories.99 Even partial Russian success will threaten NATO and EU cohesion as member states differ between accommodation and confrontation. The longer the war continues, the greater the chance that support for Ukraine and for sanctions may degrade, enabling a frozen conflict, continued instability, and the prospect of further aggression downstream. These outcomes will be complicated by other crises, such as the current confrontation between Israel and Hamas in Gaza, which can only divert attention and resources from Ukraine.
Discussion and Recommendations

An effective Black Sea strategy should seek to address and solve the root causes of instability, not nibble at their margins. If Ukraine is successful in ejecting Russian forces from its territory, opportunities exist for diplomacy to create new conditions to stabilize the region by offering sanctions relief based on positive Russian behavior. These include the removal of Russian forces from Georgia and Moldova; a restart of arms-control negotiations; closer economic integration of Black Sea states with the West and a corresponding increase in prosperity and standards of living; stronger democratic institutions and political stability; a reduction in energy dependence on Russia; and a relaxation of tensions and lowered potential for conflict in the region.

In some capitals, the prevailing view is that expelling Russian forces from Ukraine is unlikely. A deeper analysis challenges this view. The Russian force that entered Ukraine in February 2022 has been badly damaged. Russian ammunition stocks, especially of precision-guided munitions, have been depleted and replacement efforts crippled by sanctions, forcing Moscow to seek resupply from Iran, North Korea, and China. Poorly trained and unmotivated conscripts, recalled reservists, and prison convicts have been pressed into service to fill gaps in Russian units, but their performance has been unimpressive. Russian generalship and campaign strategy are poor, while Russian air and naval forces have performed below expectations. Hundreds of thousands of military-age males have fled the country, contributing to a manpower crisis that must inevitably bring pressure to bear on Putin’s regime.

The Ukrainian armed forces have suffered high casualties, though far from Russian totals, yet their morale and will to fight remain strong. The people of Ukraine overwhelmingly oppose ceding land to Putin in exchange for an unlikely peace. Ukraine continues to field trained, well-equipped new formations, even while filling gaps in existing units (the Russian army is stretched to replace combat losses and is unable to generate new forces due to deficiencies in equipment, training facilities, and cadre). Ukrainian manpower reserves are still adequate, and Ukraine’s leadership and generalship are clearly superior to Russia’s. If Ukraine is provided with certain needed capabilities—above all, long-range fires, airpower, breaching equipment, and adequate artillery ammunition—its recovery of its national territory in the near term is more likely than not.

Deterring Russian aggression in the region also depends on more capable in-place forces. Here NATO and the EU can, and should, provide needed economic and security assistance. For small, weaker states like Georgia and Moldova, this means credible, modernized ground forces in division strength, along with stronger and better air and coastal anti-ship defense, backed up by trained reserves. For Romania and Bulgaria, less threatened by Russian ground forces but vulnerable to attack by ground- and sea-launched ballistic missiles, it means more and better air defense and anti-ship missile defenses, as well as more capable naval forces. NATO “tripwire” forces in the form of battalion battle groups can also help to show Alliance solidarity and to remind potential aggressors that an attack on one means an attack on all. If supported by Turkey, a standing NATO naval task force, perhaps based at Constanta, would support maritime deterrence. If not, post-conflict rotations of NATO warships, augmented by Black Sea naval units, can substitute. These forces would not pose an offensive threat to Russian territory, but would ensure that NATO maritime deterrence is effective across the region.

Stabilizing the Black Sea region requires more than military action and goes well beyond Ukraine. The neighboring states of Georgia and Moldova have weak militaries and face economic and political challenges, due to the continued occupation of parts of their territory by Russian troops as well as a lack of integration with the West. As with Romania and Bulgaria, membership in NATO and the EU offers security guarantees as well as economic and political assistance that can stabilize and improve conditions both internally and across the region. Deferring membership until these states meet more stringent standards makes them more susceptible to Russian influence. Accession should be expedited as much as possible, with the understanding that the timing is complicated while the war is ongoing. The European Council’s recent decision to open accession talks with Ukraine and Moldova and to grant Georgia is a positive step in this direction, even as the EU’s merit-based process for candidacy makes 2030 the earliest likely date for membership.
Meanwhile, the West continues to hold certain sanctions in reserve, and diplomatic steps to pressure major powers like India, Brazil, South Africa, and—above all—China to suspend support to Moscow can be intensified. Here, international organizations can be importantly leveraged. In the information domain, potential exists to exploit disaffection between oligarchs and Putin’s “power vertical,” estranged military and intelligence officials, and an increasingly resentful population traumatized by huge military casualties and economic hardship. Doing so could increase pressure on Putin while undermining the potency of Russia’s war machine. During the Cold War, the US government was organized and focused on this terrain. It can be again.

With these considerations in mind, the following recommendations can underpin a successful and effective strategy for the Black Sea.

**Diplomatic**

- Expedite, to the degree possible, NATO, OECD, EU, and Three Seas Initiative membership for Ukraine, Moldova, and Georgia, understanding that each institution has unique requirements for membership that will require focused efforts to help the countries meet accession standards.
- Support Romania’s and Bulgaria’s reform efforts for accession to Schengen.
- Diminish Russia influence in international organizations like the Group of Twenty (G20), the International Monetary Fund (IMF), and the World Bank, including efforts to prevent Russian membership in these institutions.
- Exert stronger influence on China, India, Brazil, South Africa, and other neutral or nonaligned states to condemn Russian aggression and aid Ukraine.
- Post-conflict, seek withdrawal of Russian forces from occupied territories in Transnistria, Abkhazia, and South Ossetia in exchange for sanctions relief and trade concessions.
- Intensify efforts to exclude Chinese influence and investment in the region.
- Reestablish the OSCE as an enforcement and monitoring arm for Black Sea stability.
- Reset relations with Turkey where possible; support lifting EU sanctions and support EU accession in exchange for stronger support of Ukraine and distancing from Russia; reinvigorate NATO-Turkey relations.
- Encourage travel and investment throughout the region by key allies and friendly Asia-Pacific (Japan, South Korea, Australia) and Middle Eastern/Gulf (Saudi Arabia, the United Arab Emirates, Israel, Jordan) countries.

**Informational**

- Restructure and refocus US information efforts to better influence Russian civil society and exploit fissures among Russian elites.
- Improve coordinated messaging between allies and partners.
- Strengthen cyber defense and critical-infrastructure protection in Black Sea states.
- Mobilize Russian émigré communities to denounce Russian behavior.
- Target those withholding support for Ukraine to increase economic, political, and military assistance to Kyiv while more robustly isolating Russia economically and politically.
- Step up overt and covert support for anti-Moscow movements and parties in allied, partner, and neutral countries and inside Russia.
- Highlight internal Russian corruption and elite decadence inside Russia and abroad.
- Focus themes and messaging on Russian casualties, targeting local populations in particular.
- Leverage Russian dissidents (academic, political, military, intelligence, entertainment) to condemn Russian aggression.
- Intensify and repeat reporting on Russian war crimes and civilian casualties.

**Military**

- Reinforce nuclear deterrence with all instruments of power across all domains.
- Include Poland in the Dual-Capable Aircraft program.
- Through the efforts of NATO allies and the Ukraine Defense Contact Group, provide Ukraine with more effective military capabilities, including ramping up nascent efforts for the provision of F-16s, ATACMs, and assault
breaching equipment to enable recovery of its national territory.

● Through NATO, provide comprehensive security assistance to Black Sea states for deterrence and defense.

● Retain NATO multinational formations on the eastern flank to bolster deterrence.

● Introduce a post-conflict NATO naval task force in the western Black Sea to protect international commerce and deter Russian maritime aggression.

● Develop Constanta as the principal NATO base on the Black Sea; support Romanian naval construction there and upgrade other Romanian military facilities.

● Strengthen Ukrainian, Bulgarian, and Romanian naval power through security assistance and technology transfer.

● With the EU and through NATO, take concrete steps to improve military mobility across Europe.

Economic

● Through the EU, provide continued large-scale financial support to Ukraine.

● Step up sanctions on Russia (exclude all Russian banks from SWIFT, close European markets to Russian goods and products); consider secondary sanctions against nations that continue to conduct critical economic, commercial, and energy relationships with Moscow.

● Mirror EU efforts to grant Ukraine, Moldova, Georgia, and Bulgaria access to low- and no-interest loans and grants, and other economic assistance, to improve standards of living and strengthen democratic institutions.

● Enact legislation to authorize impoundment and use of Russian assets ($300 billion) held in US and allied/partner financial institutions to pay for Ukrainian reconstruction.

● Support measures, including direct foreign investment, to exploit offshore energy and reduce regional dependence on Russian energy for Black Sea states.

● Explore the creation of an economic/trade association of Black Sea states that excludes Russia or intensify similar efforts through EU integration.

● Provide positive and negative economic incentives to limit China’s economic support to Russia.
With sturdy and determined US leadership, implementing these options is achievable. However, should allies and partners balk at increasing aid to Ukraine or expediting NATO/EU membership for excluded Black Sea states (for example, because of fear of nuclear escalation), Russian forces will likely retain their current hold on Ukrainian, Georgian, and Moldovan territory. In that case, a stable and prosperous Black Sea region is far less likely.

Some options remain on the table that might improve stability in the Black Sea region, though the overall desired end state might not be achieved. These include even harsher economic sanctions on Russia; rotational stationing of stronger NATO troop formations on the eastern flank; intensified bilateral trade and defense agreements with selected Black Sea states, including stepped-up economic and security assistance; diplomatic efforts to further isolate Russia and improve relations with Turkey; encouragement of increased foreign investment; and help for Black Sea states in reducing dependence on Russian energy. The goal would be to contain further Russian aggression and, where possible, roll back Russian influence while striving to more closely integrate Black Sea states politically and economically with the West. Western leaders should expect that Russia will lobby strenuously for sanctions relief even as it occupies foreign territories in defiance of international law. Extremist parties, business interests, and autocratic personalities in some European countries will support these efforts, but unity at NATO and the EU will be essential to enforcing tough sanctions as the most effective means of leverage in the absence of a military solution.
The proximate cause of instability and conflict in the Black Sea region is Russia, driven by a desire to reintegrate former imperial territories and reestablish itself as a world power. Directly or indirectly, the fear of Russia has worked to keep some Black Sea states out of NATO and the EU, their best hopes for security and prosperity. NATO membership for Ukraine and Georgia, though supported at the 2008 Bucharest Summit, has been delayed indefinitely by both Republican and Democratic US administrations and in European capitals for fear of provoking Russian aggression. That policy unfortunately failed. Decisions to exclude or delay decisions about NATO and EU membership for Ukraine, Moldova, and Georgia instead encouraged Russian aggression and discouraged closer integration with Europe and the West. In effect, Moscow was given a veto on these decisions. Even as Albania, Montenegro, and North Macedonia—small states with weak militaries and economies, and with histories of corruption—were rapidly brought into NATO, the collective decision of Alliance members to exclude certain Black Sea states contributed to the current tragedy in Ukraine and broader destabilization of the Black Sea region, which is now an active conflict zone.

Today, NATO and EU members remain privately divided on the question of a negotiated settlement that would leave Russia in possession of some Ukrainian territory in exchange for a presumed cessation of hostilities. Some Allies support Ukraine’s determination to recover its occupied lands, while others appear open to negotiations short of a decisive Ukrainian victory. These would almost certainly leave Crimea and/or the Donbas in Russian hands, freezing the conflict, preventing economic gains, and perpetuating an unstable Black Sea region that serves Russian interests but works against the West’s. Further aggression in other former Russian imperial territories would be likely. This division constitutes a potential cleavage within the Alliance that Russia can, and will, exploit. Over time, there is a growing risk that Western sanctions and popular support for Ukraine will erode—a compelling reason to support Ukraine in ending the conflict quickly. The United States, NATO, and the EU should maximize the tools available now, while they are still available and effective.

At the present time, tough sanctions and successful Ukrainian military operations have weakened Russia and offer opportunities for a new strategic approach to the region. That approach should be grounded in providing the assistance required to achieve a Ukraine whole and free; firming up NATO’s presence in Bulgaria and Romania; providing security assistance to Black Sea states to strengthen deterrence and defense; leveraging economic sanctions to remove Russian troops from Georgia and Transnistria; and early membership in NATO, the EU, OECD, and the Three Seas Initiative for those Black Sea states now outside the transatlantic community. If international organizations are unable to proceed with timely admissions, a US-led coalition could be formed to take on many of these tasks. Introducing NATO troops into the conflict is not required or desirable, as properly equipped and supplied Ukrainian forces are capable of restoring Ukrainian sovereignty and territorial integrity. These steps will require muscular diplomacy, strong leadership, and firm resolve. The stakes are high, and go well beyond Ukraine—not only the European security space, but also the global, international order.

The transatlantic community has weathered many serious crises and emerged stronger and more resilient. With confident and energetic US leadership, in close partnership with the EU and other European states, these outcomes can be achieved. By removing the Russian military threat and integrating Black Sea states more closely with the West, the United States and the transatlantic community can set conditions for a more stable, peaceful, and prosperous region for decades to come.

2 Between February and May 2022, the cost of transporting dry bulk goods, such as grains, increased by nearly 60 percent, leading to a 3.7 percent increase in consumer food prices globally. “Maritime Trade Disputed: The War in Ukraine and Its Effects on Maritime Trade Logistics,” United Nations Conference on Trade and Development, June 28, 2022, https://unctad.org/webflyer/maritime-trade-disputed-war-ukraine-and-its-effects-maritime-trade-logistics.


6 Steven Pifer, “Crimea: Six Years after Illegal Annexation,” Brookings, March 17, 2020, https://www.brookings.edu/articles/crimea-six-years-after-illegal-annexation. This bridge was badly damaged in a Ukrainian attack in October 2022.

7 Ibid.


13 “The most obvious goal is food security. Russia’s invasion of Ukraine caused a surge in global food prices, dealing a heavy blow to countries already at risk of food insecurity. Ukraine has been one of the world’s largest exporters of grain, contributing 42 percent of the global share of sunflower oil, 16 percent of maize, and almost 10 percent of wheat. Not only are Ukraine’s exports essential for the stability of world markets, but Ukraine’s grain exports have also contributed greatly to the World Food Program’s humanitarian stocks, shipped regularly to such war-ridden countries as Yemen, Ethiopia, Somalia, and South Sudan.” Iliya Kusa, “The Ukraine-Russia Grain Deal: A Success or Failure?” Wilson Center, January 9, 2023, https://www.wilsoncenter.org/blog-post/ukraine-russia-grain-deal-success-or-failure.


26 “[Turkey] logged a ‘record high’ of $28.3 billion in ‘net errors and omissions’ in the first eight months of this year, likely from Russian oligarchs looking for safe places to park their wealth or from Russia’s state enterprises.” Yoruk Isik, “In Turkish-Russian Relations, The Ukraine Grain Deal Is Not the Point,” Middle East Institute, November 9, 2022, https://www.mei.edu/publications/turkish-russian-relations-ukrain-grain-deal-not-point.


42 “Although there has been a pro-Euro-Atlantic majority in all elected parliaments over the past two years, the leading political parties have failed to form a stable government, leaving power in the hands of a succession of caretaker governments with clear links to Kremlin-controlled oligarchic networks.” “Seizing the Moment: Will Bulgaria Establish a Euro-Atlantic Government after the Parliamentary Elections?” Center for the Study of Democracy, April 3, 2023, https://csd.bg/blog/blogpost/2023/04/03/seizing-the-moment-will-bulgaria-establish-a-euro-atlantic-government-after-the-parliamentary-elect/.


46 “Moldova’s security relies on being able to procure gas and generate electricity, otherwise domestic destabilisation, through Russian Hybrid operations, is most likely, and Transnistria may be next in the cross hairs of Russia.” Bernard Siman, “No Security for Ukraine or Europe without a Secure Black Sea and Mediterranean,” Royal Institute for International Relations, December 6, 2022, https://www.egmontinstitute.be/no-security-for-ukraine-or-europe-without-a-secure-black-sea-and-mediterranean/.


50 Since 2008, popular support for Georgia’s European and Euro-Atlantic integration has risen to an all-time high. According to a recent opinion poll conducted by the National Democratic Institute (NDI) in 2021, 80 percent of Georgians expressed their support for Georgia’s EU membership (up from 76 percent in 2020), while 74 percent of the population supported NATO integration (up from 69 percent in 2020). Natia Seskauri, “Russia’s ‘Hybrid Aggression’ against Georgia: The Use of Local and External Tools,” Center for Strategic and International Studies, September 21, 2021, https://www.csis.org/analysis/russias-hybrid-aggression-against-georgia-use-local-and-external-tools.


54 Weitz, “China and the Black Sea Region—A Bridge Too Far?”


56 The Black Sea Fleet order of battle includes five guided-missile frigates (two of which were damaged), four corvettes (two damaged), six Kilo-class diesel attack submarines, five amphibious assault ships (two damaged), and assorted anti-submarine, coastal patrol, and minesweeping craft. The flagship, the cruiser Moskva, was sunk in 2022. Most of the fleet was withdrawn to Novorossysk in October 2023. Peter Dickenson, “Putin’s Fleet Retreats: Ukraine is Winning the Battle of the Black Sea,” The Atlantic Council, October 4, 2023, https://www.atlanticcouncil.org/blogs/ukrainealert/putins-fleet-retreats-ukraine-is-winning-the-battle-of-the-black-sea/.


62 “Historically, Ukraine has received the majority of its natural gas imports from Russia. However, following Russia’s annexation of the Crimean peninsula, Ukraine halted direct natural gas imports from Russia and replaced those imports with natural gas from European countries. Much of the natural gas imported from Europe, however, originates in Russia and travels into Ukraine through reverse flows from central and eastern European countries.” “Ukraine,” US Energy Information Agency, last visited November 30, 2023, https://www.eia.gov/international/analysis/country/UKR/.


66 “Turkey, which has huge refining capacity, is buying record levels of cut-rate Russian crude, refining it on its own shores and then legally labeling the finished product as Turkish in origin and selling it at the global market rate.” Patricia Cohen, “Turkey Is Strengthening Its Energy Ties With Russia,” New York Times, December 12, 2022, https://www.nytimes.com/2022/12/09/business/turkey-erdogan-energy-russia.html.


68 “Romania: Country Commercial Guide.”


71 “Georgia’s Economic Dependence on Russia.”

The Three Seas Initiative "creates a political platform to promote connectivity among nations in Central and Eastern Europe by supporting infrastructure, energy, and digital interconnectivity projects. The initiative gets its name from the three seas that border the region: the Baltic, Black, and Adriatic Seas. The twelve states that are part of the initiative are Austria, Bulgaria, Croatia, the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia, and Slovenia." David A. Wemer, *The Three Seas Initiative Explained*, Atlantic Council, February 11, 2019, https://www.atlanticcouncil.org/blogs/new-atlanticist/the-three-seas-initiative-explained-2/.


Rick Waddell, former deputy national security adviser, author interview, June 2022.

Total aid of all kinds for 2022, as appropriated by the US Congress, was $113 billion. The EU has contributed $58 billion, with another $30.5 billion coming from the IMF, World Bank, UK, Norway, Canada, Australia, New Zealand, Japan, and Switzerland. China and India have contributed nothing to Ukraine. See: "Congress Approved $113 Billion of Aid to Ukraine in 2022," *Committee for a Responsible Federal Budget*, January 5, 2023, https://www.crb.org/blogs/congress-approved-113-billion-aid-ukraine-2022.


"Nor would using nuclear weapons serve [Russia] well. A nuclear attack would likely prompt NATO to enter the war directly and decimate Russian positions throughout Ukraine. It could also alienate China and India, both of which have warned Russia against the use of nuclear weapons." Richard Haass and Charles Kupchan, "The West Needs a New Strategy in Ukraine," *Foreign Affairs*, April 13, 2023, https://www.foreignaffairs.com/ukraine/russia-richard-haass-west-battlefield-negotiations.


"The nuclear weapons modernization programs include the Sentinel Intercontinental Ballistic Missile (ICBM) program (formerly known as the Ground Based Strategic Deterrent) to replace the Minuteman III ICBM; the COLUMBIA-class ballistic missile submarines (SSBN) to replace the Ohio-class SSBN; the W93 program to produce a new warhead for submarine-launched ballistic missiles (SLBM); B-52H bomber modernization; the B-21 bomber to replace the B2A Spirit long-range bomber; the long-range standoff cruise missile to replace the air-launched cruise missile (ALCM); and the W76-2 low yield SLBM warhead. The NPR also announces retirement of the B-83-1 gravity bomb and cancelation of the nuclear-armed Sea-Launched Cruise Missile program." *2022 Nuclear Posture Review*, *Congressional Research Service*, December 6, 2022, https://crsreports.congress.gov/pdf/IF/IF12266.


“Less than 10 percent of those now mobilized had carried out any refresher training within five years of leaving active service. Russian Defense Minister Sergei Shoigu himself noted that the average age of mobilized soldiers was 35.” Gil Barndollar, “Ukraine Has the Battlefield Edge,” Atlantic, February 13, 2023, https://www.theatlantic.com/ideas/archive/2023/02/wars-are-not-won-manpower-alone/673036/.


“Less than 10 percent of those now mobilized had carried out any refresher training within five years of leaving active service. Russian Defense Minister Sergei Shoigu himself noted that the average age of mobilized soldiers was 35.” Gil Barndollar, “Ukraine Has the Battlefield Edge,” Atlantic, February 13, 2023, https://www.theatlantic.com/ideas/archive/2023/02/wars-are-not-won-manpower-alone/673036/.


The Montreux Convention and Turkish political decisions limit naval options in the Black Sea. Reflagging vessels, conversion of commercial platforms into minesweepers and missile platforms, and expanded use of the Danube to bypass the Bosporus are alternatives that could be explored.


About the Authors

Task force co-chairs:

James L. Jones (Gen., USMC, ret.)
As president of Jones Group International (JGI) and one of America’s leading authorities on foreign policy, energy security, and national security, Jones provides JGI clients with strategies for navigating the complex nexus of business, international affairs, and public policy.

Jones was appointed by President Barack Obama as National Security Advisor to the President on January 20, 2009. During his tenure in the White House, Jones served as a trusted presidential advisor, represented the president as an envoy to American allies and partners, provided steady leadership during times of conflict, and oversaw an expansion of responsibilities of the National Security Council to include cyber security, homeland security, and strategic foresight.

Upon Jones’ retirement, President Obama said, “Jim has always been a steady voice in Situation Room sessions, daily briefings, and with meetings with foreign leaders ... the American people owe the General a debt for making the nation safer.”

Jones came to the White House from the private sector, where he served as the president and CEO of the U.S. Chamber of Commerce’s Institute for 21st Century Energy. At the Chamber, Jones worked to unite energy consumers and producers in pursuit of common goals—to increase US energy supply and improve infrastructure, to advance international cooperation on energy issues, to protect national energy security, and to promote a better understanding of changes to the global climate and its effects on the environment.

While leading the Chamber’s energy work, Jones also served in the George W. Bush administration as the State Department’s Special Envoy for Middle East Regional Security. In this capacity, he worked with Israeli and Palestinian officials in furthering the peace process, focused on strengthening security for both parties to the conflict.

Jones retired from the US Marine Corps in February 2007 after a distinguished forty-year career. From July 1999 to January 2003, Jones served as the 32nd commandant of the United States Marine Corps, the most senior position in the Corps.

In 2003, Jones was nominated to serve as commander, US European Command and Supreme Allied Commander, Europe. As commander of US European Command, Jones’ area of responsibility included 92 countries from Europe, Eurasia, and Africa.

In his capacity as commander of all NATO forces, Jones led the Alliance into overall command of the International Security Assistance Force in Afghanistan, the largest combat mission in NATO’s history. Jones also oversaw the military integration of the Alliance as it expanded from 19 to 26 members, and he advocated that NATO take on energy security and defense of critical infrastructure as a core mission.

Jones spent the formative years of his youth living in France, where he became fluent in French and developed a global perspective. He graduated from the Georgetown University School of Foreign Service and was commissioned as a second lieutenant in the Marine Corps in January 1967. He served as a rifle platoon and company commander in Vietnam, where he earned a Silver Star. On returning to the United States, he attended the Amphibious Warfare School in 1973 and the National War College in 1985 and served as Marine Corps Liaison Officer to the US Senate. In addition, he served as commanding officer of the 24th Marine Expeditionary Unit in Northern Iraq and Turkey on Operation Provide Comfort; chief of staff, Joint Task Force Provide Promise, for operations in Bosnia-Herzegovina and Macedonia; and commanding general, 2nd Marine Division, Marine Forces Atlantic. He also served as military assistant to the Secretary of Defense from 1997-99.

Upon leaving the White House in 2010, Jones founded Jones Group International.
Curtis M. Scaparrotti, (Gen., USA, ret.)

In 2019, Curtis “Mike” Scaparrotti completed a distinguished 41-year career in the US Army as the Commander, US European Command and Supreme Allied Commander Europe, NATO. As the NATO commander, Scaparrotti worked to preserve the security and stability of the Alliance and strengthen it in the face of traditional and new-age adversaries. He collaborated with the leadership of all 29 NATO member nations, as well as the various NATO partner countries around the world.

Prior to Scaparrotti’s leadership position at NATO and US European Command, Scaparrotti served as the commander of US Forces Korea / United Nations Command / Combined Forces Command in Seoul from 2013 to 2016. He has also served as the director of the Joint Staff, commander of the International Security Assistance Force, the Deputy Commander of US Forces Afghanistan, the commanding general of I Corps and Joint Base Lewis-McChord, and the commanding general of the 82nd Airborne Division.

Additionally, over the years, Scaparrotti served in key leadership positions at the tactical, operational, and strategic level of the United States military. These positions have included director of operations at US Central Command, and the 69th commandant of cadets at the US Military Academy at West Point. He has commanded forces during Operations Iraqi Freedom, Enduring Freedom (Afghanistan), Support Hope (Zaire/Rwanda), Joint Endeavor (Bosnia-Herzegovina), and Assured Response (Liberia).

Scaparrotti’s awards and decorations include the Defense Distinguished Service Medal, the Distinguished Service Medal, the Defense Superior Service Medal, the Legion of Merit, the Bronze Star, and the Army Meritorious Service Medal. Additionally, he has earned the Combat Action Badge, the Expert Infantryman Badge, the Master Parachutist Badge, and the Ranger Tab.

Scaparrotti graduated from the US Military Academy at West Point in 1978. His military education includes the Infantry Officer Basic and Advanced Courses, Command and General Staff College, and the US Army War College. Additionally, Scaparrotti holds a master’s degree in administrative education from the University of South Carolina.

In addition to his work with The Cohen Group, Scaparrotti is the president and chairman of Korea Defense Veterans Association, a trustee of The German Marshall Fund, a member of the board of directors of the Atlantic Council, a member of the advisory board of the Patriot Foundation, a senior fellow at the National Defense University, and a member of the advisory board of the Spirit of America.

Task Force Director and Primary Author

Richard D. Hooker, Jr.

Richard D. Hooker, Jr., PhD., is a nonresident senior fellow with the Transatlantic Security Initiative in the Atlantic Council’s Scowcroft Center for Strategy and Security, following previous service as university professor, distinguished research fellow, and the Theodore Roosevelt chair in National Security Affairs at the National Defense University. He rejoined the NDU faculty in July 2018 after service as special assistant to the president and senior director for Europe and Russia with the National Security Council from April 2017 to July 2018. From 2013 to 2017, he served as director, Institute for National Strategic Studies (INSS) at the National Defense University. As a member of the senior executive service, he served as deputy commandant and dean of the NATO Defense College in Rome from September 2010 through August 2013. Hooker is a member of the Council on Foreign Relations and holds affiliations as a senior research associate with the Changing Character of War Program at Pembroke College, University of Oxford and as distinguished senior fellow at the Jamestown Foundation.
A former White House Fellow, Hooker previously taught at the United States Military Academy at West Point and held the Chief of Staff of the Army chair at the National War College in Washington, DC. He also served with the Office of National Service, the White House under President George H.W. Bush, with the Arms Control and Defense Directorate, National Security Council during the Clinton Administration, and with the NSC Office for Iraq and Afghanistan in the administration of George W. Bush. While at the NSC, he was a contributing author to the National Security Strategy of the United States.

Following enlisted service as a paratrooper with the 82d Airborne Division, Hooker graduated with a BS from the US Military Academy in 1981 and holds MS and PhD degrees in international relations from the University of Virginia. He is a distinguished graduate of the US National War College, where he earned an MS in national security studies and also served as a post-doctoral research fellow. His publications include six books and more than sixty articles on security and defense-related topics. Hooker has lectured extensively at leading academic and military institutions in the United States and abroad.

From 1981 through 2010, Hooker served in the United States Army as a parachute infantry officer in the United States and Europe. While on active duty he participated in military operations in Grenada, Somalia, Rwanda, the Sinai, Bosnia, Kosovo, Iraq and Afghanistan, including command of a parachute brigade in Baghdad from January 2005 to January 2006. His military service also included tours as special assistant to the chairman of the Joint Chiefs, senior aide de camp to the secretary of the army, and special assistant to the chief of staff of the Army. During his career, Hooker was awarded the Distinguished Service Medal, the Defense Superior Service Medal (3d award), the Legion of Merit (3d award) and the Bronze Star Medal (3d award). As a civilian, he has also been decorated by the secretary general of NATO and the Polish and Lithuanian governments.
Members of the Task Force

Co-Chair: James L. Jones (general, retired, USMC), executive chairman emeritus, Atlantic Council; former supreme allied commander, Europe and commander, US European Command, and former national security advisor to the president of the United States

Co-Chair: Curtis M. Scaparrotti (general, retired, US Army), senior counselor at the Cohen Group; former supreme allied commander, Europe and commander, US European Command

Task Force Director and Primary Author: Richard D. Hooker, Jr., nonresident senior fellow, Transatlantic Security Initiative, Scowcroft Center for Strategy and Security, Atlantic Council; former special assistant to the president and senior director for Europe and Russia, National Security Council

Project Director: Anca Agachi, nonresident fellow, Transatlantic Security Initiative, Scowcroft Center for Strategy and Security, Atlantic Council

Project Director: Kimberly Talley, program assistant, Transatlantic Security Initiative, Scowcroft Center for Strategy and Security, Atlantic Council

Lisa Aronsson, research fellow, National Defense University; nonresident senior fellow, Transatlantic Security Initiative, Scowcroft Center for Strategy and Security, Atlantic Council

Hans Binnendijk, distinguished fellow, Transatlantic Security Initiative, Scowcroft Center for Strategy and Security, Atlantic Council

Ian Brzezinski, senior fellow, Transatlantic Security Initiative, Scowcroft Center for Strategy and Security, Atlantic Council; Former Deputy Assistant Secretary of Defense for Europe and NATO Policy

John R. Deni, research professor, US Army War College; nonresident senior fellow, Transatlantic Security Initiative, Scowcroft Center for Strategy and Security, Atlantic Council

Rachel Rizzo, nonresident senior fellow, Europe Center, Atlantic Council

Leah Scheunemann, nonresident fellow, Transatlantic Security Initiative, Scowcroft Center for Strategy and Security, Atlantic Council

Wayne Schroeder, nonresident senior fellow, Transatlantic Security Initiative, Scowcroft Center for Strategy and Security, Atlantic Council

Alex Serban, nonresident senior fellow, Transatlantic Security Initiative, Scowcroft Center for Strategy and Security, Atlantic Council

Stephen Shapiro, senior advisor, Scowcroft Center for Strategy and Security, Atlantic Council

Chris Skaluba, director, Transatlantic Security Initiative, Scowcroft Center for Strategy and Security, Atlantic Council

Alexander “Sandy” Vershbow, distinguished fellow, Transatlantic Security Initiative, Scowcroft Center for Strategy and Security, Atlantic Council; Former Deputy Secretary General of NATO; former US ambassador to Russia

Valbona Zeneli, nonresident senior fellow, Europe Center, Atlantic Council

February 2, 2023: Informal task force kick-off meeting.

March 30, 2023: First official task force convening discussing thematic scope and focus of the strategy and taskforce, destabilizing factors in the Black Sea region, the role of Turkey, and possible scenarios.

April 19, 2023: Virtual briefing with the Department of State as penholder on the US strategy development effort including included State’s Policy Planning Office; regional offices covering Romania, Bulgaria, Moldova, Georgia, Turkey, Ukraine; the Bureau of Economic Affairs; the Bureau of Energy Resources; and the NATO Policy Office.

April 24, 2023: Task force meeting on Turkey’s role in security for the region, the long-term threat of China, and the role of a Black Sea strategy in a broader European framework.

May 12, 2023: Focused task force meeting with Atlantic Council in Turkey and other Turkey experts to hear further perspectives on the Turkish role and impact on security in the region.

May 25, 2023: Task force meeting to discuss the issues of governance in the region, the impact of the war in Ukraine for Black Sea security, and deliberations over an initial draft of the task force report.

June 4 – 10, 2023: Task force delegation study trip to Romania for on-the-ground research through meetings with the Romanian government, US Embassy in Romania, experts, and a site visit to the Mihail Kogalniceanu base hosting allied troops.

June 23, 2023: Second virtual briefing with the Department of State as they prepared to release their Black Sea strategy to Congress to discuss actionable policy recommendations for the region and the findings from the group's recent study trip to Romania.

June 29, 2023: Task force meeting to identify the most critical recommendations out of the task force report draft and deliberate and adjudicate specific points of contention.

December 15, 2023: Release of the final report from the task force by the Atlantic Council and distribution across the network.
**CHAIRMAN**  
*John F.W. Rogers*

**EXECUTIVE CHAIRMAN EMERITUS**  
*James L. Jones*

**PRESIDENT AND CEO**  
*Frederick Kempe*

**EXECUTIVE VICE CHAIRS**  
*Adrienne Arsht*  
*Stephen J. Hadley*

**VICE CHAIRS**  
*Robert J. Abernethy*  
*Alessandro M. Mirtchev*

**TREASURER**  
*George Lund*

**DIRECTORS**  
Stephen Achilles  
Gina F. Adams  
Timothy D. Adams  
*Michael Andersson*  
Barbara Barrett  
Colleen Bell  
Sarah E. Beshar  
Stephen Biegun  
Linden P. Blue  
Adam Boehler  
John Bonsell  
Philip M. Breedlove  
Richard R. Burt  
*Teresa Carlson*  
*James E. Cartwright*  
John E. Chapoton  
Ahmed Charal  
Melanie Chen  
Michael Chertoff  
*George Chopivsky*  
Wesley K. Clark  
*Helima Croft*  
*Ankit N. Desai*  
Dario Deste  
Lawrence Di Rita  
*Paula J. Dobriansky*  
Joseph F. Dunford, Jr.  
Richard Edelman  
Thomas J. Egan, Jr.  
Stuart E. Eizenstat  
Mark T. Esper  
*Michael Fisch*  
Alan H. Fleischmann  
Jendayi E. Frazer  
Meg Gentle  


*Executive Committee Members*  

**HONORARY DIRECTORS**  
James A. Baker, III  
Robert M. Gates  
James N. Mattis  
Michael G. Mullen  
Leon E. Panetta  
William J. Perry  
Condoleezza Rice  
Horst Teitltschik  
William H. Webster  

[List as of July 5, 2023]