BLACK SEA
SECURITY
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THE BLACK SEA TRENDS

STRONG CURRENTS, STRATEGIC DEPTH AND HIGH WAVES

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UKRAINIAN PRISM:
TEN YEARS
OF EXPERTISE

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CONTENT

METHODOLOGY

The research methodology will consider the Black Sea region as a complex nonlinear system, where states are elements of a system with a behaviour model determined by existing political, economic, geopolitical, and other relevant trends.

Trends are based on both intrastate factors and a broader regional context. Trends that are formed under the influence of critical factors create the basis for scenario development at the level of individual states and interstate relations (trend-impact effect). The identification of the cross-impact effect provides opportunities for building development scenarios for the region as a whole.

At the same time, avoiding the methodological trap of constructing a positive, negative and neutral scenario (when the researcher's biased opinion determines the definition of positive and negative scenario, and when constructing a scenario, all positive factors are included only in the positive scenario, and all negative ones — only in the negative, which leads to a distortion of the assessment), the study is based on an assessment of the height and frequency of fluctuations in the system and will be divided into three categories:

- A scenario of a stable Black Sea region, when fluctuations caused by factors and trends at the national and regional levels will not lead to an imbalance of the system,
- A scenario of an orbitally stable Black Sea region, when individual trends will create significant deviations of the system from the norm but will remain within certain limits,
- A scenario of an unbalanced Black Sea region, when fluctuations caused by critical factors and trends will lead to an unstable region with an uncertain vector of the situation development.

For this purpose, experts conducted an assessment of the limits of the system's orbital stability — identifying which of the fluctuations appear to be permissible, although undesirable, from the point of view of the actors involved. The next step was to identify factors and trends, the implementation of which will lead either to fluctuations of the system within the limits of the determined orbital stability or to going beyond such limits.

Hypothesis verification took place by conducting a number of semi-structured expert interviews and surveys with representatives of the regional states, as well as the UK and the USA. These interviews and surveys are not representative but illustrative and indicative, used in an accumulative, anonymous, not-quoted manner to be considered as a brainstorming effort rather than sociological verification. The research was conducted in April-May 2025.

MAIN TRENDS

Strategic Depth: Intrastate Trends

The current situation in the Wider Black Sea region is seriously fragmented when domestic trends and individual country policies are dominating the regional dynamics. Despite the overwhelming effect of the Russian-Ukraine war and its significant influence over regional processes since 2014, the very intrastate trends frame a strategic depth. A number of trends are similar for several states and reflect global trends, while others are particular for the individual states, though having an impact regionally.

The Democratic Aspirations vs. Authoritarian Backsliding dichotomy has shaken the region in a few states of the region, demonstrating the citizens' desire to move forward to deeper integration with the EU, accompanied by the pursuit of European democratic values and rules. Simultaneously, support for the polar views is growing. This dichotomy challenge increases with two spin-offs: European integration vs Euroscepticism and Right-wing populism vs Stable democracy.

For Ukraine, joining the EU is a strategic goal embedded in the Ukrainian Constitution. In Georgia, more than 80% of the population favours a pro-European path. In the Republic of Moldova, at the Referendum in 2024, 50.35% voted for further EU integration and the respective amendments were included in the Constitution. Armenia, in recent months, has also demonstrated significant progress on the path of EU-related reforms.

However, some national leaders and parties are regressing on democracy or exploiting populist sentiment. For example, Georgia's government halted EU accession efforts until 2028 despite the prevailing public support for the EU. Russia-style "foreign agent" laws limit the capacities of agents of change and supporters of European integration. The prevalence of the pro-European agenda is not irreversible in the Republic of Moldova: war (Russia-Ukraine) fatigue and socio-economic frustrations caused by Russian energy supplies pressure fuel support for pro-Russian or anti-establishment forces, even under the guise of pro-European rhetoric.

Eurosceptic parties have gained a foothold in politics — a phenomenon virtually unseen a few years ago that has now entered the mainstream of parliamentary politics in Bulgaria, Georgia, and Romania. The risks of the respective changes remain in Armenia at the elections in 2026. The risks of snap elections in Bulgaria and Romania might strengthen this trend.

Increasing populism in countries like Georgia and Romania, as well as their possible rise to power in Bulgaria, became a characteristic of 2024-2025 politics. These populists utilise "exhaustion" with the Russian-Ukraine war and economic hardship, riding over anti-Ukraine or anti-EU narratives.

The political situation in Türkiye is once again destabilising. Despite statements of President Erdogan that he would not search for yet one presidential term, arrests of the opposition representatives, including the main competition — the mayor of Istanbul — is a sign of continued deterioration of the political situation that can jeopardise the country's political stability before the next elections and can be used by the external malign influence. The country remains polarised, and Erdogan's continued rule is not guaranteed in the long term. Any major shift, such as an opposition win or domestic instability, might alter Türkiye's foreign policy orientation overnight. The continuous democratic backslide, growing authoritarian ruling, and opposition pressure became features of Azerbaijan as well.

Experts overwhelmingly view the political environments in their home countries as fragile, with the majority describing them as either "somewhat unstable" or "very unstable".

The economy of the region is affected by the Russian-Ukrainian war disruptions. Traditional trade routes have been limited, if not ruined. Moldova — a landlocked country historically reliant on Ukraine's Black Sea ports — when the war began, lost access to its primary export routes via the Ukrainian ports of Odesa and Chornomorsk and had to reroute its goods via the overburdened and costlier Romanian port of Constanta. Ukrainian grain exports faced enormous challenges impacting global food security. The grain deal negotiated in 2022 and broken a year later by Russia has been a temporary relief. The new navigation route by territorial waters of littoral states executed to unblock some of the Ukrainian ports, as well as building new terminals on the Danube, demonstrated the fragility of the existing maritime regimes in the Black Sea and dependence of the littoral states from the export by sea, stressing the limits of ports capacities (e.g. Romanian port of Constanta). The question of sustainable maritime commerce will remain crucial and will need updated regulations when the post-war Black Sea regime emerges.

In some cases, the war had the opposite effect. Georgia gained a short-term benefit from interim overland trade flow via the Middle Corridor. However, the interim decisions lacked sustainability and, consequently, strategic investments. Chinese potential investment in the megaproject development in Anaklia port is considered controversial and risky from national security considerations. This may influence Georgian negotiations with the EU, relations with the USA, and provide China with the capacity and opportunity to control a very important route for trade between Europe and Asia.

Ukraine's economy, needless to say, has been devastated by the full-scale invasion – GDP fell by about 30% in 2022, and while some recovery is expected, it operates far below pre-war capacity.

While Romania and Bulgaria's membership in the EU granted certain economic stability and growth, the respective growth in Georgia and Armenia is often an outcome of deeper trade relations with Russia. It is not systemic but rather a short-term stimulated effect, containing the risks of overdependence on Moscow.

Eastern EU members (Bulgaria, Romania) coordinate under EU structures, while Caucasus states form ad-hoc alignments (e.g. the Azerbaijan-Türkiye alliance, Georgia's separate deals with China or the EU). A trend-impact consideration here is that if the war's end enables new multilateral initiatives (perhaps a Black Sea development and reconstruction fund or security community), it could unlock prosperity; if fragmentation persists, countries will develop unevenly and remain vulnerable to external manipulation through bilateral deals.

Energy security and diversification remain crucial challenges for the region. Many Black Sea states were historically dependent on Russian energy; Russia's use of **"energy warfare"**(supply cuts, price manipulation) has forced diversification. While for Romania and Azerbaijan, it was not a major challenge due to their own energy production and the prospects of the "Neptun Deep" offshore field, Bulgaria and the Republic of Moldova have faced the necessity of significant supply shifts, which had negative socio-economic implications (particularly in the case of the Republic of Moldova where growth is anaemic with around 1% forecast).

Russia is the primary destabilising force in the region, as well as a long-term regional power. Russia's full-scale invasion of Ukraine in 2022 shattered regional security arrangements and marked the culmination of its revisionist agenda in the post-Soviet space. If Russia prevails in its war with Ukraine, it will fuel its growing assertiveness across the region. However, even the failure in Ukraine may propel Russian efforts to regain control in the region's countries. It continues to occupy Ukrainian, Georgian, and Moldovan territories against international law, and it can leverage tools like "peacekeeping forces" (e.g., in Transnistria or until 2023 in Karabakh) or new bases in occupied Abkhazia to pressure the neighbouring states.

A striking aspect of the Black Sea economic scene is the absence of efficient regional economic cooperation frameworks. The Black Sea Economic Cooperation (BSEC) organisation exists but is politically impotent. The Russian-Ukraine war also additionally underscored the limits and ineffectiveness of the BSEC, which appeared incapable of mediating or playing any noticeable role in preventing the blockade of the Ukrainian ports and guaranteeing the safety of commercial navigation and ports activities.

Strong Currents — The Trends That May Have A Game-Changing Effect

The dominant threat to regional stability is **the continuation of Russia's war in Ukraine,** that can take several forms — either intensification of the military activities with the new offensive operation or an attempt to freeze hostilities, which most probably lead to the new stage of attrition rather than the Transnistrian variant of a frozen conflict. A protracted stalemate in Ukraine keeps the entire region in a state of deadlock – normal economic development is impossible under high security uncertainty, and every neighbouring state remains on edge for spill-overs. Even more alarming is the prospect of war escalation beyond Ukraine: for example, a direct Russian attack on NATO territory in the Black Sea region or destabilisation of the so-called "Transnistrian Moldovan Republic" where Russian forces are still illegally present or Gagauz Autonomous region where pro-Russian sentiments are strong.

However, on the other hand, the war so far has backfired on the Kremlin's influence: Russia finds itself militarily weakened and economically sanctioned, which has already led to shifts in the region's security architecture. Russia's traditional role as a security guarantor in Armenia is in doubt – Armenian leaders openly question Moscow's reliability after it failed to prevent Azerbaijan's advances in 2023 and take actions to leave ineffective CSTO.

A sudden collapse or democratisation in Moscow would be a game-changer (removing the principal military threat), while a hardened or revanchist regime (especially if bolstered by a rapprochement with a future isolationist US administration) could double down on aggressive tactics.

Türkiye is an anchor of regional security, yet also a regional power with its own agenda. Under President Recep Tayyip Erdoğan, Türkiye has pursued a balancing act: maintaining dialogue with Russia (for economic and strategic reasons) while also supporting Ukraine (e.g., supplying drones, upholding the Montreux Convention to limit Russian warships, and brokering the grain export deal). Türkiye's influence is especially notable in the South Caucasus: the Türkiye-Azerbaijan alliance is at the heart of the post-2020 Caucasus order, to the point that Ankara's support was decisive in Azerbaijan's victory in Nagorno-Karabakh.

However, Türkiye's role can be double-edged. On the one hand, Türkiye contributes to containing Russia, for example, by strictly enforcing the Montreux Convention, which limits Russian naval reinforcement in the Black Sea during the war against Ukraine. Turkish naval and air power also help monitor the Black Sea, and Ankara has proposed regional security initiatives. On the other hand, Türkiye's own internal politics are volatile. In 2024, the possibility of Türkiye joining BRICS became a perspective that could be a significant game-changer, considering Turkish membership in NATO. At the same time, Turkish experts said Erdogan's overtures toward joining BRICS could be to gain leverage in Turkey's EU accession bid.

The withdrawal of Russian forces from Syria had a significant effect on Turkish approaches to the Black Sea security and the Russian-Ukrainian war, as the Russian presence and support of the other side in the Syrian conflict has deterred Ankara significantly. A significant decrease in the threat on the Syrian-Turkish border (southern theatre) allows Turkey to play a more agile role on the Black Sea (northern theatre). Still, the trend is observed that Türkiye reorients its priorities towards the Middle East with less ambitions for leadership in the Black Sea region. In essence, Türkiye is a critical stabiliser in some scenarios and a wildcard in others.

Expanded conflict scenarios also include a renewed **Armenia–Azerbaijan** war or an Azerbaijan–Iran conflict. Even a localised war (such as fighting in the Caucasus) can destabilise the region through refugee flows, disruption of energy and trade routes. The incidents at the **Georgian-Russian** border or the contact line with separatist regions can be expected to keep the Georgian government quasi-neutral, preventing a change of their position to more pro-Ukrainian. At the same time, the deterioration of Russian-Georgian relations due to the border incidents can have an opposite effect, with the Georgian government returning back to the Western alliance and pro-European pass in search of security support.

Another destabilising trend would be a **significant pullback by Western powers (US/EU)** from supporting the region's security and integration. There are multiple potential drivers: war fatigue among the Western public, changes in government (e.g. a US administration less supportive of Ukraine or European governments with pro-Russian leanings). The domination of populists accompanied by the withdrawal of the Western countries will multiply the effect. At the same time, a reduction in Western economic support – for example, less aid for Ukrainian refugees or reconstruction, smaller EU budgets for enlargement and defence – could cause economic distress that populists would exploit, potentially bringing **pro-Russian parties to power** in vulnerable democracies. Sovereigntist movements in EU countries like Bulgaria and Romania will gain a boost and potentially strengthen the trend within the EU (already highlighted by the elections results in Germany) and emerging authoritarian regimes in Hungary and Slovakia.

Militarisation of the region, securitisation of additional spheres (including trade, navigation, and food security) have already significantly influenced the situation and relations dynamics in the region with spill-over effects far beyond the Black Sea. In this regard, there are two important trend-factors to follow. First, a navy strategy development and priorities of the littoral states. The choice between classical navy platforms' construction and the build of the marine drones' fleet following Ukraine's example for asymmetric warfare in the Black Sea. The second factor is the Turkish position towards the Montreux Convention application in case of the potential ceasefire between Ukraine and Russia. The decision to resume the Russian navy's ability to pass the Bosporus may have a dramatic effect, with more warships entering the Black Sea, compensating for losses from Ukrainian attacks and growing Russian power projection in the maritime domain. At the same time, it may result in Ukraine's demand to bring its ships received from the UK and the Netherlands and currently stationed there to the Black Sea Ports.

Economic instability can quickly translate into political and security instability – a trend to watch is the potential for sharp economic downturns or financial crises in one or more states. A sudden economic crisis would fuel protests and could crash governments, creating openings for anti-democratic forces. It can also lead, in the case of Turkey, to their withdrawal from major political negotiations.

Finally, we consider trends that may not necessarily be driven by state policy but can destabilise nonetheless. These include **cyber-attacks** (Russia has conducted cyber warfare against Ukraine and could target energy grids or financial systems of neighbours, Iran was active with their cyber operations, and China is a potentially disruptive player as well), **mis/disinformation campaigns,** including those generated by AI tools, and pandemics or natural disasters.

The cross-impact effect may come into force when military escalation would inevitably lead to economic crises. Political shift toward authoritarianism in one state could worsen unresolved or frozen conflicts. The Black Sea region's challenges are *interdependent*, often amplifying each other. A longer war means lasting economic pain, which boosts support for populist and pro-Russian forces, who consequently would undermine regional solidarity. In its turn, the lack of solidarity may prolong the war and regional solidarity.

High Waves — The Impact of External Players

The behaviour of the external players obviously impacts the region's destiny. For the Black Sea region, this impact is controversial as many of them can have an influence that meanwhile they do not execute. This situation is not new and adds to the dichotomy of regional affairs when regional countries (except Russia and Turkey) constantly have emphasised the necessity of greater involvement of external players, while the EU, US, NATO, etc., have been hesitating or performing as following the tides — rising and falling. Still, their positions towards regional affairs may have a significant impact even without proper policy involvement.

The European Union and the United States are considered the main external players who can influence the situation in the Black Sea region. However, the question remains on whether they can or will influence the current state of affairs.

The EU's influence in the Black Sea region is primarily political and economic. Through its enlargement and neighbourhood policies, the EU has become a key external anchor for reforms. At the same time, the EU has not become a security actor for the region. This slightly changed with the involvement in the Russian-Ukraine war, but it is still an exception rather than a rule.

Bulgaria and Romania bring the EU's physical presence to the western Black Sea shore. For countries like Ukraine, Moldova, and (prospectively) Georgia, the EU offers a path to membership that is a powerful driver of domestic change. Since Russia invaded Ukraine, the EU has actually increased its engagement: it granted Ukraine and Moldova EU candidate status in 2022, deployed an EU monitoring mission on the Armenia-Azerbaijan border (EUMA) in 2023, and brokered high-level talks between Baku and Yerevan. However, the EU faces challenges in the region, too. Azerbaijan is less interested in political ties with Europe (focusing on energy sales on its own terms, making more contacts with Asian states). Georgia's government has openly snubbed EU aid and recommendations. At the same time, Armenia returned to the integration dialogue, which abruptly ended in 2013.

The European Union is developing an updated Black Sea strategy that may be presented already in 2025. There are expectations that this document will significantly differ from the Black Sea Synergy (version 2007 and later editions) that looked at the Black Sea region without a perspective of being an integral part of the Union and not covering regional security concerns adequately. However, there is still a lack of clarity on which EU institution will be in charge of the final text — DG Near or EEAS as this may significantly influence its focus.

The United States has been the principal military aid provider to Ukraine and other regional countries. American diplomacy has also been active in some of the Black Sea issues: the US helped mediate certain phases of Armenia-Azerbaijan talks and has signalled a long-term commitment to Black Sea security via initiatives like the proposed US Black Sea Security Act (2023) aimed at enhancing regional defence cooperation. However, regional observers note an ambivalence or uncertainty in Washington's long-term vision for the Black Sea. This is a result of the long-experienced absence of coherent US policies towards the region, minimal ambitions, and preferences towards bilateral rather than regional approaches. Romania and Ukraine remain the biggest promoters of greater US participation, while the US itself prioritise its involvement via the NATO mechanisms.

The **United Kingdom**, while no longer in the EU, has actively supported Black Sea security: the UK leads a NATO battlegroup in Romania and has deepened bilateral ties with Ukraine since 2018 (naval training, anti-ship missiles, etc.). Becoming one of the leaders of the coalition of maritime capabilities for Ukraine, London clearly identifies its interests in the Black Sea maritime domain.

For the Black Sea region, the lack of NATO presence in the region has always been visible. This partially happened due to the long-term Turkish position (consonant with a Russian one) that littoral states should be responsible for regional security by themselves, thus creating a Russian-Turkish military and security dominance in the region. Despite several attempts to include the Black Sea in the summit's final declaration, it is still perceived as a neighbourhood rather than an integral theatre of operations. The adoption of a more coherent strategy and operational plans that will include both the three littoral member-states and Ukraine's capabilities on the sea may change the situation.

In essence, the involvement of the UK and the USA acts as both a shield (through NATO) and a diplomatic weight (ensuring Russia cannot dictate outcomes). The degree to which these allies stay engaged – or, on the contrary, disengaged – will heavily shape the strategic environment.

China's direct footprint in the Black Sea region is currently modest but growing. Beijing's interest is mainly in economics, investing in infrastructure (ports, railways) and seeking access to European markets through its Belt and Road Initiative. In Georgia and Azerbaijan, Chinese companies are notable investors (e.g., China is helping finance Georgia's Anaklia port and other transit infrastructure). Politically, China has kept a low profile; it does not explicitly involve itself in conflicts or alliances in the Black Sea, focusing instead on stable relations with all sides (including arms sales to some and investments to others). Still, its role is growing due to the strong partnership and assistance to Russia, as well as malign influence and interference.

Other external actors include **Iran**, which borders Azerbaijan and Armenia but also became one of the main military allies of Russia. Iran has a complex role: it cooperates with Armenia (as a fellow sanction-hit state and to counter the Azerbaijan-Israel partnership) and is at odds with Azerbaijan, viewing Baku's close ties to Israel and pan-Turkic ambitions as a security threat.

In summary, external actors bring both support and strain. Western engagement generally provides security guarantees and economic lifelines that bolster regional states' resilience, whereas Russian (and, to an extent, Iranian) involvement tends to exploit divisions and fuel conflicts. Türkiye stands in between – a regional power whose choices can either reinforce a Western-led order or carve out a more independent sphere of influence. The interplay among these external forces sets the stage for either a more stable or a more fragmented Black Sea region in the coming years.

SCENARIOS

"Dead Water Drift": Scenario of a Stable Black Sea Region

The security environment in the Wider Black Sea region has changed significantly, and there are no chances of returning to the pre-2014 status quo. The number one threat to regional stability is the continuation or expansion of Russia's war in Ukraine. However, even in the case of a cease-fire, notwithstanding its conditions and sustainability, certain turbulence will remain an attribute of the region.

A "normal" or stable situation in the Black Sea would mean Ukraine and its allies are able to maintain control over the region, ensuring security and preventing any aggressive actions. Balance of power and return to the Black Sea as a Russian-Turkish "lake" seems quite impossible, even in the best-case scenario, as it will not be accepted by Ukraine and other NATO member-states.

One scenario that may follow is entering a period of deceptive calm. The most visible fighting may cease, but the underlying drivers of conflict will remain unresolved. The continued fighting of low intensity without an attempt of the new assault can also be a possible option for this scenario as the region has already partially adjusted to this modus operandi. However, real strategic progress will be blocked by hybrid threats, frozen conflicts, and the persistent shadow of Russian influence.

Countries like Moldova and Ukraine will continue to pursue EU integration while Armenia pushes democratic reforms. Still, all will operate under significant external pressure. The Georgian political crisis will decrease with the current government choosing formal EU integration. However, under this scenario, there will not be dramatic domestic political changes to cancel undemocratic legislation and pressure against the opposition.

The EU will present a new Black Sea strategy that will focus predominantly on the economic, social, and environmental agenda, enlargement policies and joint security concerns. However, it will lack the EU vision as a regional security actor, and the Black Sea will remain an outskirts/neighbouring territory rather than an integral part of the EU area.

The Middle Corridor may provide some economic relief and incentive, yet (bearing in mind that Moscow views it as a direct threat to its strategic influence), Russia will seek to sabotage it through proxy actors and disinformation. The need for the Kremlin to pursue some compensation for the failed Ukrainian offensive can convert into increased pressure on Georgia. The policy of stick and carrot will probably be applied when carrots are ensured by increasing entanglement in Russian trade flows, accompanied by the risks of economic dependency and political drift. Simultaneously, any attempts at economic diversification by Tbilisi may face amplified Russian pressure, including the usage of occupied territories for the further destabilisation of the country.

Türkiye, under such a scenario, will continue to balance between the status of a regional stabiliser and potential spoiler since its internal politics and foreign ambitions may convert into regional risks. Ankara and the EU will intensify dialogue on some issues of regional and bilateral agenda, including visa-liberalisation, anti-Russian sanctions avoidance, Syria, Israel-Gaza, and de-mining of the Black Sea, hence avoiding human rights and political freedoms.

Opening the border between Turkey and Armenia and between Armenia and Azerbaijan may occur gradually, which will symbolise the closing of the 2020-war-chapter. Under this scenario the Russian role in the Caucasus will decrease, especially concerning its influence over Armenia.

Potential destabilisers will impact the efficiency of the governments in the littoral EU states: Romania and Bulgaria. The necessity to balance social and security policies may result in social dissatisfaction, unrest, and growing anti-EU sentiment (this fact will eventually weaken the already fragile European influence in the region). Polarised parliaments and weak governments may eventually weaken NATO's Eastern flank or at least slow down the evolution of the security arrangements in the region.

Among the new normal is the creation of Ukraine's unmanned naval fleet, the loss of the Russian Black Sea Fleet's military dominance over most of the Black Sea area, and the gradual improvement of Russia's maritime counter-drone capabilities. This also may include increased Romania-Bulgaria-Turkey maritime cooperation based on the de-mining mission. Consequently, under this scenario, no additional disturbances are expected to the grain export from Ukrainian ports, with slow attempts to widen cargo types, including container shipping.

The aforementioned circumstances will create preconditions for regional turbulence, which will be an attribute of the new normal when the region is stuck in uncertainty.

"Choppy Waters": Scenario of an Orbitally Stable Black Sea Region

This is a scenario of persistent friction and uneven turbulence. As the Black Sea security has always been in flux, the level of tolerance towards possible regional disturbances is quite high among the regional actors.

While full-scale war is avoided, the region is plagued by political instability, nationalist rhetoric, cross-border suspicion, and low-intensity clashes.

The following is considered by interviewed experts as "tolerable" for the region's general stability.

Short-term trade disruptions. This can mean both a continued closed border between Armenia and Azerbaijan, Armenia and Türkiye, protests at the Ukraine-Romania border (similar to Polish protests against Ukrainian grain export), and a short-term limit of navigation due to the military activities or de-mining.

Türkiye choosing a policy of minimising "grey" trade and avoiding sanctions may influence the current Russia-Türkiye trade and Turkish economy, but most probably will not have a serious destabilising effect as it will not be a policy of joining anti-Russian sanctions. This factor may also include the energy trade and transportation, with Moldova shortages or Ukraine black-outs being in the focus.

Diplomatic tensions between the states is almost a "normal" scenario for the region, which has experienced a number of frozen conflicts for decades. Having a number of potential weak points, tensions may be expected between:

- Azerbaijan and Armenia in the process of conflict settlement,
- Armenia and Russia due to Armenia's European integration,
- Georgia and Ukraine, due to the democratic backslide and cooperation with Russia,
- Georgia and Russia, due to the construction of the naval base in Ochamchira, occupied Abkhazia,
- Russia and Türkiye due to the sanction's implementation, Türkiye's support of NATO position or statements regarding Crimea status,
- Moldova and Romania due to the interference in domestic politics, statements of the nationalistic politicians regarding countries' unification, etc.

Military exercises at the borders and minor military activities. Depending on the level of such exercises and their scenarios, they can bring additional tensions in bilateral relations, even with possible minor incidents. Nevertheless, none of the regional states are ready for a major conflict, so in case of such developments, maximum efforts will be applied to decrease the risks and tensions. The EU can play a mediator role, except in cases with Russian involvement. The abovementioned military exercises may also include maritime exercises, where Russian-Turkish navies or coastal guards can face each other. The violation of the airspace of the littoral states, including NATO member-states, should also be considered a possible development. Spoofing, jamming and other disruptions to the safety of navigation may lead to diplomatic scandals and increased security measures but will not upsurge military risks till the unstable level.

The backlash against liberal democracy and Western influence grows, amplified by populist leaders who channel war fatigue and economic grievances into Eurosceptic narratives with a spill-over effect far beyond the Wider Black Sea region.

Georgia's isolation and pivot towards authoritarianism was named by some experts as a possible scenario. While the level of probability may be seen as high under current conditions, nevertheless, it will not have a significant regional effect. Georgia's backslide from democratic reform may become irreversible, whereas weaponising legislation against civil society and media may become a role model and regional trend with another spill-over effect potentially spreading to Moldova, where the political field becomes increasingly fragmented, with pro-European aspirations clashing with populist disillusionment.

The same effect may become relevant for Armenia. While attempting diplomatic normalisation, the country is destabilised by unresolved border tensions and elite competition (particularly in the 2026 electoral campaign and respectively after the elections). The Zangezur Corridor remains blocked, symbolising the deep mistrust between Armenia and Azerbaijan.

Such circumstances will boost nationalist forces across the region, whereas external actors can meddle through information warfare. Meanwhile, polarisation will paralyse governance. Any attempts to integrate or institutionalise the new frameworks of cooperation will be stalled.

Political instability in Türkiye, which may intensify as the presidential elections in 2028 approach, may be a distracting factor that will lead to Ankara's withdrawal from security high-level activities and mediation efforts, concentrating on domestic rivalry.

At the same time, **the Türkiye-Europe rapprochement** stipulated by the Russian-Ukraine war and Russian withdrawal from Syria can become a positive trend that can influence both domestic and regional situations. This will depend on Ankara's priorities — security and national interests vs political competitions and attempts to secure political control in the country. Transactional issues, such as stronger economic cooperation, an upgrade of the Customs Union, and visa liberalisation, will reappear in the bilateral agenda, however, will stay under the serious challenge of normative principles application. Such a rapprochement can also be stimulated by the US withdrawal from Europe and Turkish readiness to contribute to joint military industry production, where Türkiye has an advantage.

US engagement in the Black Sea Security remains the factor under question, which still has a significant effect in case it happens. However, under this scenario, we may not expect a coherent regional policy but rather increased presence in the individual states (Ukraine, Romania) and increased security dialogue with Türkiye.

Environmental crises of a significant level as a result of Russian military activities in the region should also be considered under this scenario. As the implementation of the Black Sea Convention has already been under question since 2014, incidents like the Russian grey fleet tanker accident in December 2024 with a fuel spill caused one of the worst ecological catastrophes in the region, can become more frequent. The absence of monitoring and legislation implementation, bad conditions of ships due to sanctions, neglectance of norms for the Crimean and Azov ports and proper international rescue mechanisms in place may lead to the next accidents that will affect not only Russia and Ukraine.

"Riptide Zone": Scenario of an Unbalanced Black Sea Region

This is the rupture scenario — where systemic pressure fractures the region into open conflict and regional crisis. Most of the experts considered that the region would experience major instability in the next five years.

Hostilities resume between Armenia and Azerbaijan, dragging in external actors. Even a localised war can destabilise the region through refugee flows, disruption of energy routes, and the risk of drawing in larger powers (Turkey, Russia, Iran).

Russia expands its military presence in occupied Georgian regions while launching aggressive hybrid operations in Moldova and continuing its offensive in Ukraine, aiming to cut Ukraine from access to the Black Sea with the silent support of the Big Players. This scenario may include reigniting the conflict in Transnistria either due to military provocations, incidents, or false-flag operations. This will need Ukrainian and Romanian involvement, as well as will open additional opportunities to the Russian forces under the pretext of protecting their military forces stationed in Transnistria.

Under such circumstances, the Black Sea maritime domain becomes a theatre of conflict, with blockades, drone strikes, and naval encounters risking escalation. NATO and Russian forces operate in dangerously proximity, and any miscalculation could trigger a direct confrontation. An incident at sea or a mistaken engagement of Russian forces – could spiral quickly with spill-over effects far beyond the Black Sea. Martial law in multiple states, economic free-fall, and possibly the closure of the Black Sea to civilian shipping entirely can be the consequence.

This forecast is driven by a mix of domestic and external concerns. Internally, **political polarisation,** the rise of pro-Russian forces, upcoming elections, and challenges to democratic governance are seen as potential sources of disruption. At the same time, developments in neighbouring countries – such as populist surges or foreign policy shifts – are also viewed as possible threats to regional balance.

Russia's success in establishing full control of Georgia. Specifically, if the ongoing protests are unsuccessful, Russia will take over Georgia by peaceful means. By doing so, it will strengthen the power projection not only in the wider Black Sea region, but partially in the Middle East. Plans to build a military base in Ochamchire and open Sokhumi airport in occupied Abkhazia (for the first time in 30 years) — are vivid demonstrations of these efforts. This development is possible in case of the complete withdrawal of EU/NATO engagement with Georgia.

Lifting restrictions under the Montreux Convention in the event of a Russia-Ukraine ceasefire that currently prevent Russia from bringing additional ships to the Black Sea may significantly affect the security balance in the region. It will annul all efforts of Ukraine for the asymmetric warfare, will provide Russia with additional forces for a new attack and the protection of Crimea's occupation. This will also lead to further militarisation of the Black Sea. Such a situation will affect not only Ukraine and may result in the total blockade of the navigation in the North-Western part of the Black Sea but also threaten Türkiye and other NATO allies, as well as demand their significant navy presence that will be impossible without bringing non-littoral NATO states ships. The latter will cause a significant dilemma for Ankara.

Domestic instability in Türkiye due to the increased political confrontation, a new refugee crisis from the Middle East, fuelled by the Russian hybrid warfare that most probably will accompany the economic crisis in the country, may have unpredictable consequences. From a new coup (low probability) to the power concentration and cracking over opposition (high probability), it will lead, in any case, to the deterioration of the Türkiye-EU relations. Under such a scenario, Ankara may re-orientate again towards Russia.

Instability in Turkey could destabilise the balance of power in the region. Conflict between Greece and Turkey could cause problems for the Black Sea region and disrupt trade flows. Moreover, this will lead to a crisis inside NATO that will have a spill-over effect on the region as well.

Recognition of the Russian status of Crimea by the US may also have a noteworthy negative impact not only on the Russia-Ukraine war. It will raise the issue of the territorial integrity principle, cause a domino effect, and provoke all countries of the region to reconsider their borders. In most cases, this may lead to military confrontations, considering the history of the regional conflicts.

RECOMMENDATIONS

While the outcome of the Russia-Ukraine war is considered a main factor that can influence the future development of the Black Sea region, several trends, including regional fragmentation, domestic political polarisation, and growing EU ambitions, can be observed. Türkiye and the US policy choices may have a game-changing effect if applied, as both actors still are not ready to change the status quo. The main dilemmas countries will face are guaranteeing the safety of navigation, developing asymmetric navy capabilities, preventing democratic backsliding, and implementing EU reform.

The following recommendations can be considered for the orbital stable region development:

- ➡ The Black Sea should be considered as a separate issue in any negotiations around the Russia-Ukraine war. Prevention of Russian military and navy build-up in the region and guarantee of the safety of navigation and ports' activities should be included.
- ➡ The EU needs to plan a security strategy for the Black Sea region. This should be particularly executed in case of weakened NATO or the continuation of the policy towards restricting their presence in the region.
- ➡ Ukraine should initiate a maritime dialogue with the littoral states (plus Moldova, minus Russia) to develop a joint position regarding the future security arrangements in the Black Sea region, tackling the existing challenges (de-mining, maritime incidents, environmental accidents, spoofing, etc.). The joint navy exercises and operational plans within NATO can be developed.
- ➡ Considering the impotency of the regional organisations and mechanisms, the pan-European institutions should be engaged, especially in issues of environmental control, commercial navigation safety, ports' security, integrated border management, etc.
- ➡ Collaboration of regional think tanks, independent media, and academic institutions to develop and disseminate shared risk assessments, early warning alerts, and incident tracking systems would be of added value. Civil society should advocate for the creation of national and regional early warning mechanisms and networks that integrate citizen reporting, social media monitoring, and community-level conflict mapping. The respective instruments for funding these initiatives should be launched and enhanced.