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Russia's Intentions and Actions in the Black Sea

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Executive Summary

This paper examines Russia's intentions and actions in the Black Sea region through three analytic lenses: how Russia seeks to advance its interests with individual Black Sea states: how Russia exploits or is affected by the Black Sea's role as a conduit of critical flows of energy, people, food and other commodities; and how Russia uses the Black Sea as a springboard to project power and influence in the South Caucasus, the Middle East, and the Mediterranean.

Russia seeks to become the dominant power in the Black Sea, in part by subordinating the other six Black Sea states. Its efforts are a tale of uneven successes and notable setbacks. Its military interventions in Georgia in 2008 and in Ukraine in 2014 and 2022 prompted its Black Sea neighbors to minimize their dependencies on Russia, hedge their bets on future developments, and diversify partnerships with other countries. The war against Ukraine continues unresolved, draining Russian resources, preoccupying elite attention, and literally sinking Russia's Black Sea naval ambitions. The rift between the two countries is unlikely to be bridged for generations. Türkiye's complex cooperative-competitive relationship with Russia has positioned Ankara as the biggest obstacle to Moscow's ability to dominate the Black Sea, even as the two countries engage in mutually beneficial transactions. NATO/EU members Romania and Bulgaria have each distanced themselves from Russia, although each country's politics continues to be volatile. Domestic discontent in Moldova and Georgia offers fertile ground for Russian tactics of influence, corruption, subversion, and disruption, which are amplified in each case by Russia's military presence in breakaway regions in each country.

Russia's efforts are amplified by its actions to leverage critical flows of people, energy, food and other commodities across the region. It instrumentalizes these flows to limit Western influence, evade international restrictions on its activities, and promote its own connectivity and economy. Here too its efforts have had mixed results. It has gained grain markets at Ukraine's expense, but has generated greater food insecurity for millions and tensions with scores of recipient countries around the world. Its weaponization of people flows meets the definition of war crimes. Its efforts to use energy as an instrument of influence has spurred Black Sea countries to seek non-Russian alternatives. To evade international sanctions, it has had to develop elaborate and inefficient trading and shipping schemes across the region and beyond.

Russia has encountered setbacks in its efforts to use the Black Sea as a platform from which to project power and influence to neighboring areas. Russia remains a significant player in the South Caucasus, but has lost its role as regional hegemon. Its war against Ukraine has similarly diminished its influence in the Middle East and the Mediterranean. Its naval failures in the Black Sea, and Ankara's closure of the Turkish Straits, has removed the Black Sea's role as a springboard for Russian activities in these adjoining regions. Given its strained capabilities, Moscow was forced to choose its war in Ukraine over its ongoing support for Syrian dictator Bashar al-Assad, and is now scrambling to regain some degree of influence with the country's new leadership. The loss of its bases in Syria, in turn, has complicated its efforts across the Mediterranean and into Africa.

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Introduction

This paper examines Russia's intentions and actions in the Black Sea region through three analytic lenses. First, we look at how Russia seeks to advance its interests with individual Black Sea states. Second, we analyze how Russia exploits or is affected by the Black Sea's role as a conduit of critical flows of energy, people, food and other commodities. Third, we discuss how the Black Sea relates to Russian interests in adjoining regions – the South Caucasus, the Middle East, and the Mediterranean. We focus on Russia's goals, tools, and instruments of influence, look at the principal challenges and vulnerabilities Russian leaders believe they face, and assess how Russia's war against Ukraine has affected Russian approaches to the Black Sea region.

This report draws on, synthesizes and integrates the findings of 13 short analytical briefs prepared for this project. It also benefits from the collective insights of a core working group of experts and practitioners specialized in Russian engagement in the Black Sea who exchanged views on these issues in four virtual workshops as part of this project.

Russia's Intentions and Actions in the Black Sea

Russia seeks to become the dominant power in the Black Sea, an essential element in its determination to reassert itself as a great power and re-establish its sphere of influence in the post-Soviet space and central and eastern Europe—and beyond. An important driver of its strategy is the desire to dominate the six other Black Sea states. Three of these—Ukraine, Moldova and Georgia—were part of the USSR; two of these – Romania and Bulgaria -- were members of the Warsaw Pact. Türkiye is the only state that was not historically dominated by Russia, and with whom Russia has a long history of rivalry and war.

In recent decades, Russia has pursued a multi-faceted policy toward the other six states, seeking to subordinate them to Moscow, using both coercion and incentives. Hard power is an essential element, as Russia has demonstrated in its wars against Georgia (2008) and Ukraine (2014 and 2022). But it employs a variety of means beyond the military. The Kremlin supports pro-Russian parties in all these countries, has interfered in their elections, and sought to carry out coups against incumbents. It uses disinformation to persuade populations that aligning themselves with Russia is preferable to supporting pro-Western elites, appealing to people who are disillusioned with the failure of their governments to bring them prosperity and stability. It uses coercion to increase their dependence on Russian energy. The Russian Orthodox church appeals to its counterparts abroad to support them against "satanic," "woke" Western culture and promotes "traditional" family values, finding resonance among significant swaths of the population. And Russia uses espionage and sabotage to threaten the stability of its Black Sea neighbors. So far Russia has not succeeded in many of its endeavors, but it remains determined to undermine the independence and sovereignty of most Black Sea states. We review Russia's relations with each of the other six countries in Section I.

Russia's efforts to influence Black Sea countries are amplified by its actions to leverage critical flows of people, energy, food and other commodities across the region. It instrumentalizes these

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flows to limit Western influence, evade international restrictions on its activities, and promote its own connectivity and economy. Section II addresses these issues in greater detail.

Finally, Moscow views the Black Sea as an important springboard for projecting power and influence into neighboring regions – the South Caucasus, the Middle East, and the Mediterranean. We discuss these interregional linkages in Section III.

The Historical Context

For centuries, Russia has believed that the Black Sea is essential for its security. Catherine the Great annexed Crimea from the Ottoman Empire in 1783. Prince Grigory Potemkin, her consort, founded the Black Sea fleet in Sevastopol in the same year. For much of the nineteenth century, Russia competed with the Ottoman Empire and with Europe's major powers for influence in and around the Black Sea. But Russia's presence in the region began to grow during the Cold War, when the Soviet Union became the dominant power in the region, with NATO member Türkiye as its main competitor. Türkiye has controlled the entry to the Black Sea since the Montreux Convention of 1936, but the USSR dominated all the other littoral states. The Soviets also saw the Black Sea as a means to project power into the Eastern Mediterranean and the Middle East.

After the collapse of the Soviet Union, Russia's role in the Black Sea changed dramatically. Georgia, Ukraine and Moldova became independent countries and pursued closer ties with the West. Romania and Bulgaria eventually joined NATO in 2004 and the European Union in 2007. Russia lost its access to parts of the Black Sea's coastline that it had in the past directly or indirectly controlled. After years of contentious discussions, in 1997 Russia and Ukraine agreed to divide up the Soviet Black Sea fleet headquartered in Sevastopol. In 2010, Ukraine renewed Russia's lease on the fleet until 2042 but, after Putin's annexation of Crimea in March 2014, Russia took over most of the Ukrainian ships in Sevastopol and Ukraine had to move what was left of its navy to headquarters to Odesa. Putin claimed that, had Russia not taken over Crimea, "NATO ships would have ended up in the city of Russian naval glory, Sevastopol."[2]

Between 2014 and 2022, Russia tripled its de facto coastline on the Black Sea and strengthened its position there through a combination of military, diplomatic, economic, energy and disinformation tactics.

Putin has been focused on resurrecting and strengthening Russian maritime power since he entered the Kremlin 25 years ago and had achieved a significant naval buildup prior to the 2022 invasion of Ukraine. He created a more modern, agile and multipurpose navy. After he annexed Crimea in 2014, he strengthened Russia's naval presence in the Black Sea, enabling Russia to increase its influence in the Eastern Mediterranean, a vital theater of Russia's operations after it intervened militarily to support Syrian President Bashar al-Assad in 2015. Russia also modernized its existing naval base in Tartus, using that to facilitate its return to becoming a significant player in the Middle East.

Prior to the full-scale invasion of Ukraine, therefore, Moscow had solidified its presence in the Black Sea after two decades of post-Soviet atrophy. After the invasion began, Russia faced new challenges to the Black Sea fleet and to its presence in the Black Sea.

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I. Russia's Relations with its Black Sea Neighbors

Türkiye

Russia and Türkiye have experienced centuries of conflict, much of which has played out in the Black Sea. Between the sixteenth and twentieth centuries, the Ottoman and Tsarist empires were frequently at war. Several of these wars enabled Russia to gain access to the Black Sea by taking territory from the Ottomans. When Türkiye joined NATO in 1952, Moscow and Ankara were on opposite sides of the Cold War. After the Soviet collapse, the Kremlin was concerned that Türkiye might become a competitor in the Turkic-speaking countries of Central Asia and promote Islamic teaching. Although Türkiye did build religious schools in several Central Asian states, it never succeeded in replacing Russian influence in these countries as Moscow once feared it might.[3] Meanwhile, Russian-Turkish economic relations grew and Türkiye became the second largest market for Russia's energy resources. Russia has built a nuclear power plant in Akkuyu which it will jointly operate with Türkiye. Ankara has become an even more important transit route for Russian gas after Kyiv ended Russia's exports through Ukraine. At the same time, Türkiye seeks to diminish its own dependence on Russian energy supplies while enhancing its own role as an energy crossroads, as we discuss in more detail in Section II. Türkiye has become a major destination for Russian tourists.

Russia's conducts active media and influence operations in Türkiye. In reaction to efforts by Turkish president Recep Tayyip Erdogan and his ruling AKP party to eliminate most independent media outlets, many Turks have turned to Russia's *RT and Sputnik's* Turkish-language edition for outside sources of information. Russian media have sought to undermine Türkiye's political and security cooperation with the United States and Europe by exacerbating mutual skepticism and highlighting policy differences. In Türkiye, Russian media efforts have contributed to anti-Western discourse and have reinforced and informed the Turkish government's own propaganda pursuits.[4]

Russia supported Erdoğan after the attempted coup against him in 2016 and Türkiye purchased Russian S-400 air defense systems, angering its NATO allies and prompting the United States to remove Türkiye from the F-35 jet program. Russia, understanding that Türkiye is perhaps NATO's most problematic member, has sought to capitalize on Türkiye's differences with its NATO partners. Today, Türkiye is the only NATO member state not included in Russia's list of "hostile states."[5] Indeed, in its 2023 Foreign Policy Concept, Russia discusses Türkiye positively in the section on ties with the Islamic world, rather than in the section on the European region, downplaying its NATO membership, since NATO is described as consisting of "unfriendly" states.[6]

Ankara can exercise leverage over Moscow because it can grant or deny ships access to the Black Sea. Türkiye has regulated military and merchant traffic into and out of the Back Sea since 1936, when the Montreux Convention—which guarantees free passage through the Turkish Straits during peacetime—was signed. After Russia's 2022 invasion of Ukraine, Türkiye invoked the Montreux Convention to close the Turkish Straits to military vessels, thereby reducing Russia's military naval capacity in the Black Sea and also the danger of armed confrontation

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between Russia and other littoral states. This move enhanced Türkiye's economic influence. Ankara played a key role in the Black Sea Grain Initiative, which created procedures to export grain from certain ports to deal with a worldwide food crisis that Russia had created by attacking Ukraine and to ensure that Ukrainian and Russian grain could reach destinations where it was most needed.

Ukraine has been the main focus of Russia's relations with Türkiye since 2022. Indeed, the Russia-Ukraine war has intensified Russia's ties with Türkiye and also created more problems for Moscow. Erdoğan, who has said that Crimea must be returned to Ukraine, has been a steadfast supporter of Ukraine since 2022. Türkiye has supplied drones to Kyiv, and the Baykar company (widely seen as Erdoğan's family business) has constructed an industrial facility near Kyiv for building long-distance drones.[7] Although Putin in 2023 left Türkiye's Black Sea Grain Initiative, Türkiye has succeeded in enabling commercial shipping to operate in the Black Sea. Erdoğan also convened early peace talks between Russia and Ukraine after the war began, but these failed for several reasons, including the discovery of Russian atrocities committed in the Bucha suburb of Kyiv.[8] Türkiye continues to offer to mediate between Russia and Ukraine. And despite Putin's opposition to Türkiye's support of Ukraine, Türkiye has not joined its NATO partners in imposing sanctions on Russia. Indeed, it has also helped Russia during the war by becoming a major enabler of Russian evasion of sanctions. It has been a prominent player in the "shadow fleet" which transports sanctioned Russian oil.[9]

Another major theater of Russian-Turkish interactions has been the war in Syria, which Russia entered in September 2015. While Russia supported the Assad regime, Türkiye supported the forces trying to depose Assad. In November 2015, Turkish-Russian relations were severely strained when the Turks shot down a Russian Sukhoi-24 fighter jet that, so Türkiye claimed, strayed into Turkish air space, killing the pilot. Russia denied that the plane had entered Turkish space on its way to Syria. Erdoğan initially refused to apologize for the incident. Russia then imposed harsh economic sanctions and forbade tourist groups from going to Türkiye, and Turkish-Russian trade decreased by 50% although Russian gas still flowed to Türkiye. Eventually, Erdoğan apologized in June 2016, after enduring months of Kremlin invective. Shortly thereafter, there was an abortive coup against Erdoğan by disaffected military officers, and Putin backed Erdoğan's narrative on the origins of the coup.

The rebel offensive that toppled Assad in November 2024 has given Türkiye the upper hand in Syria and reduced Russia—which granted asylum to Assad and his family—to seeking to preserve its naval and air bases in Tartus and Khmeimim. Türkiye has emerged as the key outside player in the new Syria because it consistently backed the current ruling militias and gave asylum to millions of Syrians who fled the Assad regime. It remains to be seen how much Russia can recoup its presence and influence in Syria, as we discuss in Section III.

Türkiye has also increased its influence vis a vis Russia in another theater of great importance to Moscow—the South Caucasus. Since the 2020 Armenia-Azerbaijan war over the disputed Nagorno-Karabakh enclave, Türkiye has strengthened its ties with Azerbaijan. Turkish peacekeeping forces were deployed to the region, supplementing the Russian peacekeepers. This changed in September 2023, when the Azeris defeated the Armenians and took over Nagorno-Karabakh, forcing the Armenian population there to flee. Armenia, a traditional ally of Russia

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and member of the Collective Security Treaty Organization (CSTO) was angered by Russia's failure to support it during the war. Russia's involvement in its war with Ukraine reduced its willingness and ability to come to Armenia's assistance, facilitating Yerevan's defeat.[10] Armenia has now suspended its participation in the CSTO, has distanced itself from Russia, and is seeking to improve ties with both Türkiye and the EU.[11]

Russian and Turkish interests also clashed in Libya in 2019, when the forces of Marshal Khalifa Haftar, backed by the Wagner mercenary group, were defeated by forces supported by Türkiye.[12] Libya remains a divided country with two competing governments. Russia's ability to sustain its engagement there is limited, and Türkiye remains a rival in Libya.

Russia's ties with Türkiye are, therefore, complex, extensive, and both cooperative and competitive. Türkiye remains the biggest obstacle to Russia's ability to dominate the Black Sea.

Georgia

Russia's ties to Georgia have fluctuated since Georgia became an independent country. After Mikheil Saakashvili became president following the 2003 Rose Revolution, he was determined to distance Georgia from Russia and move his country toward NATO and the EU. Relations between the two countries deteriorated precipitously, culminating in Russia's invasion of Georgia in 2008 and Moscow's recognition of the independence of two breakaway regions, Abkhazia and South Ossetia. Since then, Russia has supported the governments of these two entities and continues to have military bases in both. In March 2022 it deployed units from those bases to join its invasion of Ukraine.[13] It seeks to enhance its already substantial influence over these entities, challenging Georgia's sovereignty (Box 1.)

Russia is a significant market for Georgian goods and an important supplier of food and energy. Georgia, in turn, has always been a key country for Russia in the South Caucasus due to its geography and soft power.[14] Georgia provides an important transit route from Russia to Iran, the Middle East, to Türkiye, and further to India along the North-South corridor. It is a significant connector of various energy pipelines from the Caspian region to Europe, providing alternatives to the Russian pipeline system. Georgia's access to the Black Sea guarantees its role in trade both with the Black Sea region and Europe and the Mediterranean.

Until recently Georgia's soft power represented a challenge to Russian interests in the region and beyond. After the 2003 Rose Revolution, Georgia was the most reform-minded and pro-Western country in the post-Soviet space. Moscow viewed this with alarm. Georgia for a while was a role model for those countries in the post-Soviet space seeking to distance themselves from Russia and reform their societies and tackle corruption. Georgian politicians and NGOs played an important role in supporting reforms in Ukraine and Eastern Europe. Georgia showed how new leaders could successfully fight corruption and build state capacity. Russia was threatened by the prospect that a successful Western-oriented Georgia could inspire other post-Soviet states to move out of Russia's orbit. But in 2012, the victory of the Georgian Dream party, controlled by the enigmatic billionaire Bidzina Ivanishvili, who has close business ties to Russia, began to change Georgia's trajectory, much to the Kremlin's satisfaction.

Today, Georgia is run by a government that is far more pro-Russian and skeptical of the West, although the majority of the Georgian population still supports integration with Europe.[15] The

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Georgian Dream party wants to benefit from Georgia's location by promoting transit and trade with Europe and China as well as Russia, Iran and Türkiye. Political non-alignment enables the country to develop into a transit hub in all directions. Russia hopes to make greater use of Georgian highways, ports and airport infrastructure in the future. Ivanishvili's ownership of businesses in Russia through offshore companies, gives Russia leverage over him and reinforces his desire not to have hostile relations with Moscow. After the 2022 invasion, Georgia refused to join Western sanctions against Russia and to close its airspace to Russian aircraft. It has also helped Russia to evade Western sanctions.[16] Russians escaping the Ukraine war have flocked to Georgia and Russian tourists use Georgia to fly to other destinations, given that flights to and from Russia to Europe are banned.

Since the 2022 invasion, Russia's policy priorities in Georgia have changed. It needs alternative transit routes to new markets and new trading partners to circumvent Western sanctions. Given Iran's central role in supplying drones and other weapons for Russia's war, trade routes to Iran via the South Caucasus have become even more important. After Ukraine's destruction of much of Russia's Black Sea fleet, Russia reconstructed the Ochamchire port in Abkhazia to become a permanent base for parts of the Black Sea fleet, but what Russia really seeks is access to Georgian ports and infrastructure.

Russia has increasingly focused on influencing Georgian society to make it less pro-Western. Moscow has used the close connections between the Russian and Georgian Orthodox churches and the resonance that the Kremlin's "anti-woke" ideology finds among more traditional societies like Georgia, to increase its influence there. The ruling party has adopted some of most repressive Russian laws—for instance, Russia's "foreign agent" law and its anti-LGBT legislation. And Russia's penetration of Georgian society is growing. As Vasil Sikharulidze notes, "Russia's influence operations in Georgia represent one of the Black Sea region's most comprehensive hybrid warfare campaigns. The Kremlin has employed military intervention and territorial occupation, economic embargos, energy leverage, political co-optation, corruption, and information warfare."[17]

The October 2024 parliamentary elections returned the Georgian Dream party to power. The official election results gave Georgian Dream 54% of the vote, while exit polls gave the opposition parties a 10% lead over the Georgian Dream. Mass protests by the pro-Western population over vote fraud have ensued for months, with protestors calling for a new vote and wrapping themselves in EU flags.[18] These protests continue today and have been met with brutal force and arrests by the Georgian police. The new government has turned its back on decades of Georgia seeking European integration and suspended the negotiations on Georgia's EU accession.[19] Public opinion data showed the impact that Russia's war on Ukraine has had on Georgian society. Many Georgians feared that Russia could attack Georgia next, so they voted for the more pro-Russia party that they hoped could avoid another Russian invasion.

In 2008, Russia invaded Georgia to prevent Tbilisi moving closer to NATO and the EU. Today, Georgia is moving closer into Russia's political and economic orbit. It is more closely aligned with Russia than many of the other littoral states, despite that fact that Russia occupies 20% of its territory. Russia has used the full array of levers it possesses to turn Georgia away from the West: coercion, corruption, disinformation, culture wars and economic incentives. But Georgia's

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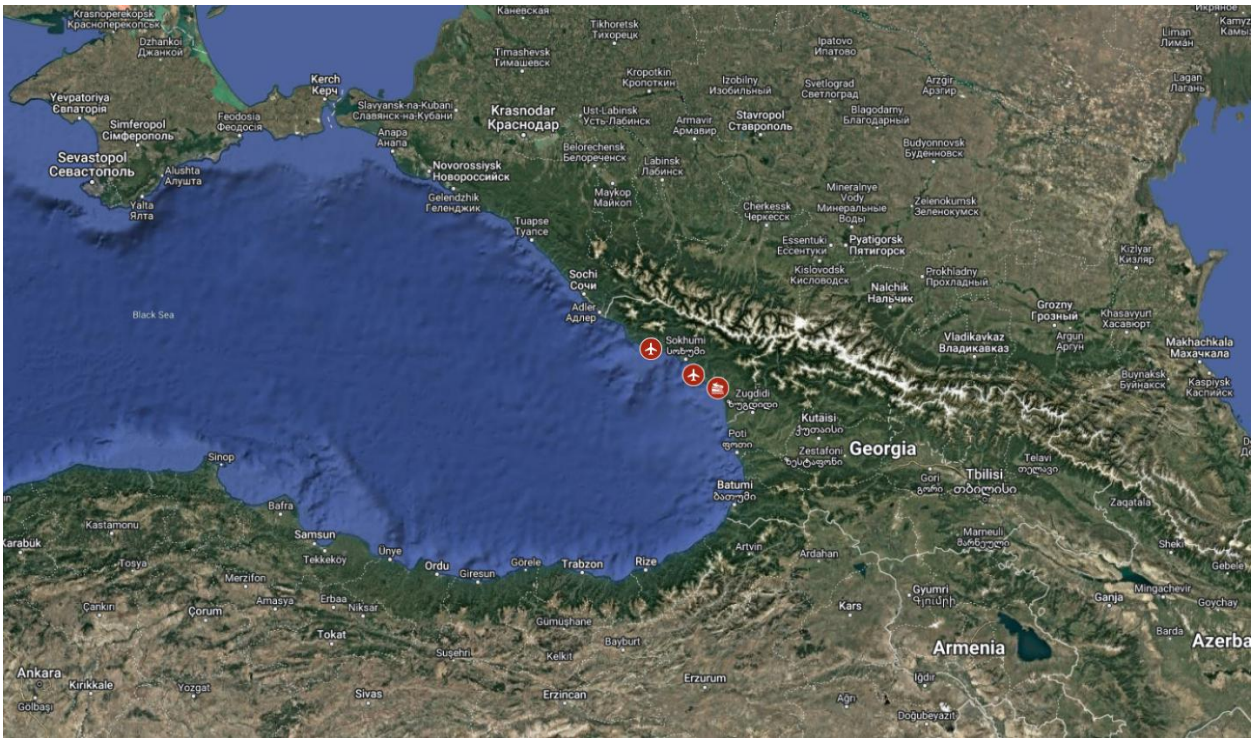
own fractured and corrupt domestic politics have provided fertile ground for Russian interference, much to the dismay of many Georgians.

Box 1. Russia and Georgia's Breakaway Regions of Abkhazia and South Ossetia

Map 1. Russian Installations in Abkhazia



Sukhumi Babushara Airport *7th Military Base (Russian Armed Forces)*

Russian Naval Base, Ochamchire

Source: Valentin Châtelet, in Sopo Gelava, Valentin Châtelet, "Russia expands its strategic footprint in occupied Abkhazia," DFR Lab, April 17, 2025, https://dfrlab.org/2025/04/17/russia-expands-its-strategic-footprint-in-occupied-abkhazia.

Following the Russia-Georgia war in 2008, Russia recognized Abkhazia and South Ossetia as independent states, thereby occupying 20% of Georgian territory. Abkhazia has become an important part of Russia's strategy for the Black Sea. Moscow's strategic interest in Abkhazia is three-fold: as a Black Sea base, as a North-South route, and as a bargaining chip with Tbilisi. Ukraine's destruction of much of Russia's Black Sea fleet has enhanced Russia's interest in Abkhazia's Black Sea coast, both its port in Ochamchire and its lucrative real estate. But there is resistance in Abkhazia to Russian designs on Abkhaz territory. Georgia's prime minister has pledged that his country will join the European Union by 2030, together with Abkhazia and South Ossetia.[20] The Russians have scoffed at this idea, and it is indeed difficult to see how

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Georgia could reintegrate these territories or, indeed, whether the EU will accept Georgia by then.

In 2024 Moscow stepped up efforts to exploit its influence over Abkhazia and challenge Georgia's sovereignty. It pushed Abkhaz authorities to sign an investment agreement that privileged Russian interests and enhanced Abkhazia's economic dependence on Russia. It suspended financial aid to Abkhazia and ordered the cash-strapped region to buy Russian energy at market rates. It began preparations to reopen Sukhumi Babushara airport, which had been closed to international air traffic for over thirty years.[21]

However, the terms of the proposed investment agreement were so onerous that popular protests in fall 2024 forced out Aslan Bzhania, Abkhazia's Moscow-backed leader, and pressured the region's parliament to reject the deal. Bzhania's successor, Badra Gunba, secured Russian pledges of financial and energy support ahead of new presidential elections for the breakaway region, which he ultimately won against Bzhania. While Gunba says he does not plan to implement the investment deal, in May 2025 the sanctioned Russian carrier UVT Aero began commercial flights to Sukhumi, in direct violation of Georgia's sovereignty.[22] The airport reopening expands Russia's strategic foothold along the Black Sea's northern coast.

Romania

In its quest to dominate the Black Sea, Russia uses many of the same tactics with countries that were once part of the Soviet Union or the Warsaw Pact. The overall goal is to weaken these countries' Western integration and penetrate their societies with Russian disinformation that turns them against Europe and the United States.

In Romania's case, Russia focuses on two aspects of Romania's foreign policy: its close ties with the United States and status as an enthusiastic NATO member, and its even closer linguistic, historical and cultural ties to Moldova. Romania is central to NATO's deterrence and defense strategy and military posture in the Black Sea region. It hosts parts of the U.S. EPAA missile defense system at Deveselu, has provided U.S. forces with access to key facilities such as Mihail Kogălniceanu airbase and the Port of Constanța since 1999, and has developed national infrastructure to enable an enduring U.S. and allied military presence and combined training and exercises. It has been a strong supporter of Ukraine and a strategic partner of the United States.[23] Since Russia's 2022 invasion of Ukraine, the allied military presence in Romania has been augmented by deployment of the NATO Battlegroup, led by France with its HQ in Cincu, and a rotational U.S. Army brigade combat team. The Romanian-led NATO Multinational Division Sourheast HQ in Bucharest also supports NATO Force Integration Units in Bulgaria and Romania. The United States and the Netherlands have also been flying MQ-9 drones from Campia Turzii in Romania to bolster NATO surveillance and air defenses in southeastern Europe.[24]

Given these activities, Moscow has worked hard to support political forces in Romania who may undo this defense cooperation. Russia has periodically denounced Romania for its participation in the U.S. missile defense program, which it describes as a "direct threat" to Russia that makes the country a legitimate target for Russian attack. Since the full-scale invasion of Ukraine,

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Russian missiles have hit Romanian territory several times, but Romania has reacted cautiously to these strikes, fearing a military escalation with Russia.[25]

A government report in 2023 confirmed that Russia had attempted to infiltrate national security, defense and information services to obtain data about Romania's assistance to Ukraine and that of its allies.[26] The report also highlights Russia's threats to Romania via drone attacks near the border with Ukraine, cyberattacks and organized cross-border criminality.

Russia's other major concern is with Romania's close ties to Moldova, 25% of whose citizens also have Romanian passports.[27] The Moldovan Soviet Socialist Republic was created by the Soviets as a consequence of the 1939 Molotov-Ribbentrop Pact, which gave Bessarabia and Northern Bukovina to the USSR. Moldova became an independent country in 1991, but its language and culture are Romanian. Since the Soviet collapse, Russia has sought to dissuade Moldova from integration with the West and sees Romanian attempts to assist Moldova in its quest to join the EU and to move West as a threat to its interests.

Russia's 2022 invasion of Ukraine increased Romania's significance for Russia. Romania shares the longest NATO and EU border with Ukraine. Flows of refugees, military aid and agricultural products depend on Romania's assistance for Ukraine and more than half of Ukraine's grain exports since the war began have gone through Romania. Russia seeks to lessen support for Ukraine within Romania and has undertaken influence operations to weaken Romanian support for NATO and the EU. Russia works through far-right parties in Romania to criticize what it calls Romania's "colonization" by the EU and NATO, claiming that the West exploits Romania's resources and treats its population as if they were second-class citizens.

Russia uses a variety of means to infiltrate Romanian society. As in Georgia, the Russian Orthodox church works with the Romanian Orthodox Church to appeal to Romanian society to reject Western values. Romania is one of the most conservative countries in Europe and 31% of the population believes that Western values are a threat to their national identity and react positively to Moscow's promotion of "traditional family values." Much of the population would welcome a less open society—in 2024, 41% of Romanians aged 18-24 believe that a totalitarian regime with no election would be good for their country.[28]

Russia's most blatant interference in Romania occurred in 2024, when it financed the Presidential campaign of Calin Georgescu, a pro-Russian far-right candidate who emerged out of nowhere to win a plurality of votes—22.94%—in the November first round of the election. He conducted his campaign largely on TikTok. He urged Romanians to follow "Russian wisdom" and ensure that the war in Ukraine ended. Before the second round was held, the Constitutional Court annulled the first round, claiming that Russian interference had invalidated the vote. This decision was controversial, and a rerun took place in May 2025, with Georgescu banned from running. In the first round of the rerun elections, Nicusor Dan, Mayor of Bucharest, a pro-Western French-trained mathematician known for fighting corruption, received 21% of the vote. His rival, George Simion, a right-wing, pro-Russian nationalist, won 41% of the vote. However, during the ensuing two weeks of intense campaigning, Dan ran the better campaign, In the second round of voting, with record turnout, Dan defeated Simion by 54% to 46%. Russia's candidate lost, and Romania remains solidly in the Western camp, although the new president faces many economic and political challenges as he takes office.

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On December 4, 2024 the National Supreme Security Council of Romania declassified reports from national security and intelligence services stating that Romania has become "a priority for Russia's hostile actions, with a growing interest in the Kremlin to influence (at least) the mood and agenda of the Romanian society in the electoral context" through propaganda and disinformation, the support of Eurosceptical candidates and the support of anti-system movements and the diminishing of support for Ukraine."[29] Romanian media suggested that a digital advertising firm tied to the Kremlin channeled money into Romanian media to promote far-right and illiberal content.

It is important to remember that successful Russian interference in other countries' politics is only possible where Russian disinformation finds fertile ground. Romania, like other post-communist countries, has not fully dealt with its repressive past, and pre-1991 links to Russian intelligence services and business ties remain. Russia is able to exploit these networks but also to benefit from the disillusionment of significant parts of Romanian society that the past thirty-five years of independence and freedom has not brought them the benefits they originally envisaged post-communism would bring.

Moldova

Moldova, the weakest, poorest and most vulnerable of Russia's neighbors in the Black Sea, plays an important role in Russia's Black Sea strategy.[30] The Kremlin would like to retain political and economic control over the country and dissuade it from moving further West. It seeks to keep the country in permanent geopolitical limbo. Like Georgia, Moldova also has a festering conflict in the pro-Russian region of Transnistria, where 12% of Moldova's population lives, and Russia still has 1,000 troops stationed.[31] Moscow has both official "peacekeeping" troops there, some with legal status and some there illegally. Just under half of Transnistria's residents are native Russian speakers and hold Russian citizenship. Russia can use this region to destabilize Moldova, limiting its independence, and as leverage to hinder its Westward integration. Further complicating Moldova's situation is the presence of the Gagauz ethnic minority, an Orthodox Christian Turkic group, which is pro-Russian. In the 2024 referendum on joining the EU, 95% of the Gagauz population voted no, and many have called for closer ties to Russia.[32] With Transnistria and the Gagauz autonomous region, Russia has two built-in constituencies in Moldova.

Moldova is officially neutral and has no aspirations to join NATO, but it is now an EU candidate country. Notwithstanding its neutrality, Russia has pressured it for decades to remain a close partner. Russia still retains considerable sway over Moldova's pro-Russian political parties in a divided and corrupt country. Former President Igor Dodon, sitting on the stage with Putin, whom he praised, declared at the 2017 St. Petersburg International Economic Forum: "We are different from the Western world. We have got different cultures, we have got different values, we have different customs," he said, saying that Moldova shared its history with Russia rather than Europe.[33] Dodon ran on a platform advocating a "balanced foreign policy" in 2020 and lost to Maia Sandu, Moldova's pro-European leader. But Russia retains influence over Moldovan politics.

Recent investigations in Moldova have revealed that the web of covert and hidden Russian financial networks supporting anti-European pro-Russian forces is extensive. The fugitive

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Moldovan oligarch Ilan Sor was sentenced to 7.5 years in prison in June 2017 for his involvement in the theft of one billion dollars from Moldova's banking system in 2014, the largest bank fraud in the country's history.[34] Now living in Moscow, he has established several companies with financial backing from state-owned Russian companies and funneled roughly $15 million into Moldova during the EU accession referendum in 2024 to sway voters against joining the EU. Gazprombank, among others, was involved in this transfer of money. The EU referendum narrowly passed, and despite all the Russian-backed candidates' demonization of both NATO and the EU. As in Georgia, since the invasion of Ukraine, Russia has played on the population's fear that Moldova could be next in line for a Russian invasion if it challenges Russia's interests.

Russia also has considerable economic leverage over Moldova, especially through the energy weapon. Although Moldova has made some progress in diversifying its energy sources, it still relies on electricity supplies from Transnistria, where Russian gas powers much of the production and can pressure Chisinau by cutting back on Moldova's energy needs. As we discuss further in Section II, in January 2025 Moldova suffered a major energy crisis when gas deliveries to Transnistria were suspended after the Russia-Ukraine gas transit agreement was not renewed. Moldova is acting to reduce its dependence on Russia, but Moscow retains a powerful economic tool to weaken the country.

The Russian Orthodox church, a powerful arm of Russian soft power, is actively promoting pro-Russian and anti-European narratives in Moldova, promoting "traditional" values above those of the "decadent" West.

How successful has Moscow been in achieving its goals of destabilizing Moldova and persuading the population that they should not seek Western integration? The re-election of the pro-Western president Maia Sandu in 2024, despite Russian election interference, revealed the limits of Russian influence and the resilience of the Moldovan population. The signing of the EU-Moldovan agreement in 2022 granting Moldova candidate status provides strong incentives for the country to undertake the reforms needed to move closer to membership, which it hopes to achieve by 2030. But the referendum on membership in 2024 only passed by a wafer-thin majority of 50.4 %, revealing the extent of Russian success both in its disinformation campaign and in buying votes. Russia will continue to use all the means it has to undermine Moldova, and Chisinau will struggle to maintain its independence and ability to move toward EU membership.

Bulgaria

Russian influence in Bulgaria has historically been extensive. After all, the country's modern statehood was established as a result of Russia's victory in the 1877-1888 Russo-Turkish war, part of the Tsarist empire's drive through the Black Sea to the Mediterranean in the name of protecting the empire's Slavic and Orthodox populations.[35] Since the collapse of the USSR, the Kremlin has viewed Bulgaria as a malleable partner whose longstanding ties to Russia can assist Moscow in gaining better access to Europe. For many Bulgarians, Russia's historical role as liberator and protector of Bulgarians and their shared Orthodox and Slavic heritage remains an important part of their national memory. Bulgarians have had a more positive view of the USSR and post-Soviet Russia than most of the other former members of the Warsaw Pact.

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Moscow has sought to leverage this legacy of good will to weaken Bulgaria's integration with the West. Bulgaria pursued NATO membership less enthusiastically than its neighbors in central and eastern Europe, was reluctant to support sanctions against Russia after the 2014 annexation of Crimea, and was one of the few Western countries to refuse to expel Russian diplomats after the poisoning of ex-GRU double agent Sergei Skripal and his daughter in Salisbury, England.

As with most of Russia's other Black Sea neighbors, disenchantment with the West for not living up to the expectations that the population had after the collapse of communism and residual distrust of the West from the communist era have made Bulgarian society vulnerable to Russian disinformation campaigns. Russian social media campaigns exploit fears of Bulgarians being overrun by migrants and losing their national identity to the "godless and cosmopolitan" West. Russian propaganda also focuses on Bulgarian nationalists' grievances about North Macedonia, which they consider to be part of historical Bulgaria.[36] Public opinion data suggests that Russian propaganda is quite successful: in 2024, 57% of Bulgarians believed that Russia poses no threat to their country and 47% hold the West responsible for the Russia-Ukraine war. 61% fear that by aiding Ukraine militarily, Bulgaria might be drawn into the war.[37]

Russia also supports populist, pro-Russian politicians in Bulgaria, beginning with President Rumen Radov, who is only second to Victor Orban in the EU in his skepticism about military assistance to Ukraine and who deliberately slows down aid deliveries to Kyiv. Other politicians go further and call for Bulgaria to leave NATO, crusade against "LGBT propaganda" and advocate closer ties to Russia. Bulgaria's protracted political stalemate in parliament also provides opportunities for Russia to play on the population's frustration with their dysfunctional domestic politics. Despite all this Russian activity, Russia's popularity in Bulgaria is declining, partly because of Russia's invasion of Ukraine. The public has a significantly more negative view of Russian than it did before the invasion, although there is a persistent quarter of the population that is pro-Russian.

As with other post-Soviet countries, Russia retains more opaque connections with Bulgarian society via business networks, organized crime and intelligence networks dating from the Soviet times. Bulgarian oligarchs have worked with their Russian counterparts to benefit from non-transparent privatization deals. And the Russian Orthodox church has close connections to the Bulgarian Orthodox church and joins it in propagating an ultra-conservative, anti-Western outlook. Moreover, the Bulgarian Patriarch Daniil—just like the Russian Patriarch Kirill-- has refused to recognize the autonomy of the Ukrainian Orthodox Church, which has split from Moscow.

Russia also deploys espionage networks who engage in sabotage and influence operations in Bulgaria, as in other littoral states.

Until recently, Russia retained significant economic and energy leverage over Bulgaria after the Soviet collapse. Russia remained Bulgaria's largest import partner into the 2010s, more important than the EU.[38] As we discuss further in Section II, Bulgaria's energy sector was highly dependent on Russian supplies and Gazprom was the only source of the country's gas imports. Rosatom provided the fuel for the Kozloduy nuclear power plant and Lukoil controlled the only oil refinery in Burgas. Moscow hoped to use Bulgaria to enhance its role as an energy superpower. Russia proposed constructing an oil pipeline from Burgas to Alexandropoulos in

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Greece, which would have allowed Russian oil exporters to access the Mediterranean without having to go through the Turkish straits. The South Stream gas pipeline connecting Russia to Bulgaria under the Black Sea would have given Gazprom direct access to the EU gas market, bypassing Ukraine.

In the end, however, neither of these ambitious projects came to fruition. Western companies were too wary of investing in them. But, just before Russia invaded Ukraine in 2022, it persuaded Bulgaria to complete a scaled-back version of South Stream. The pipeline had a smaller capacity and came ashore in Türkiye, but it did reduce Russia's dependence on Ukrainian transit. After the invasion and the imposition of Western sanctions, however, when Russia insisted that Bulgaria pay for gas in rubles, Bulgaria stopped buying Russian gas altogether.[39] Bulgaria now has deals with Azerbaijan for pipeline gas and with Türkiye and Greece for LNG. Some of that gas could be Russian but Gazprom has lost its monopoly on the Bulgarian market.

Bulgaria has also decoupled from Russian oil, banning Russian oil imports in March 2024 and replacing it with deliveries from Iraq and Kazakhstan. And in June 2024 the Kozloduy nuclear power plant began to import its fuel from the U.S. and France. Russia has by now lost most of its economic leverage over Bulgaria. Today Russia's share in Bulgarian imports is 1.3%, compared to 20% ten years ago.[40] The swift end to Bulgaria's economic dependency had a detrimental effect on the Bulgarian economy but it is likely irreversible.

Russia's attempts to induce Bulgaria to rethink its European future will no doubt continue. But the reality is that the Kremlin's efforts to manipulate Bulgarian domestic politics and preserve the country's economic dependence on Russia have backfired. Bulgaria has curtailed its economic and energy dependence on Moscow and Russia now depends on Bulgaria for continuing gas deliveries via TurkStream, which is the last remaining pipeline taking Russian gas to Europe after Ukraine ended its transit deal with Russia in 2024. Bulgaria continues to host NATO military bases and U. S. soldiers, has welcome hundreds of thousands of Ukrainian refugees, and has provided Kyiv with arms, fuel and other assistance. Russian aggression has also prompted Bulgaria to upgrade its Black Sea navy and air force and make them less dependent on Russian technology. In May 2025 Bulgaria and fellow EU member state Romania supported a new and more robust "EU Strategy for the Black Sea" that seeks to enhance the EU's presence in the region in ways that are likely to counter Russian activities.[41]

Nevertheless, a sizeable minority of Bulgarians still believes that Bulgaria should ally with Russia and should renounce integration with the West. These groups, however, have limited influence on their government's politics. Bulgaria's real vulnerability to Russian pressure lies elsewhere—the corrupt networks among officials and the political and business elite that remain open to making deals with Russia if these arrangements suit their own interests better than those that the EU—with its emphasis on rule and law—can offer.

Ukraine

After the Soviet collapse, many Russians, including those in the Russian political class, refused to accept that Ukrainians were a separate nation or could have their own independent state. Vladimir Putin was the most prominent of them. His 5000-word 2021 essay, "On the Historical

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Union of Russians and Ukrainians" lays out in detail his unique version of history, which denies that Ukrainians were ever a separate nationality.[42] Putin's animosity toward Ukraine greatly increased after the annexation of Crimea, the flight of Russian-backed President Viktor Yanukovych to Russia and the coming to power of the pro-Western governments of Petro Poroshenko and Volodymyr Zelensky. Russia initiated the war against Ukraine in the Donbas region in 2014, using Russian proxies who posed as separatists. The Minsk accords of 2015, which were supposed to end the fighting, were never implemented and between 2015 and 2022 Putin planned what became the full-scale invasion of Ukraine.[43]

Putin's main motives for launching the 2022 invasion were to subjugate Ukraine to Russia, prevent it from joining either the EU or NATO, install a pro-Russian government and demilitarize it.[44] But Russia's ambitions to dominate the Black Sea have also reinforced Putin's determination to control Ukraine and reintegrate it into Russia's sphere of influence.[45] After the Soviet collapse, Russia lost access to its ports in the Baltic Sea, which has become an internal NATO lake since Finland and Sweden joined the alliance. Today the Azov-Black Sea basin is Russia's primary maritime outlet to the global ocean from its European territory. Since two-thirds of its population lives in the European part of Russia, and most of its industrial production is there, it is critical for Russia to maintain access to the Azov and Black Seas with their developed port infrastructure.

In 2014, Russia justified its annexation of Crimea by claiming that it was necessary to prevent the peninsula from being used as a NATO base. The narrative of protecting Russian security interests in the Black Sea has been a consistent theme in Russian foreign policy. Russia's 2022 Naval Doctrine, which was adopted after the war with Ukraine began, cites the Azov-Black Sea region as key for safeguarding Russia's national interests and the world's oceans. The waters are called essential for Russia's economic development, its population's well-being, national security and maintaining regional and strategic stability. The primary security threats, according to this decree, are NATO's military activities near Russia's borders.[46]

Since the war began, Russia has suffered major setbacks in the Black Sea. Early on in the conflict, Ukraine sank Russia's flagship, the *Moskva*, a significant blow to Russia's Black Sea fleet.[47] Ukraine has won the battle for the Black Sea. Using drones, cruise missiles and several unconventional techniques, it had, by October 2023, driven the Russian Black Sea fleet from its headquarters in Sevastopol to Novorossiysk, in the eastern corner of the Black Sea. Ukraine managed to sink nine major Russian ships. Russia has lost about 40% of its naval tonnage in the Black Sea since February 2022.[48]

Ukraine's 2024 Maritime Security Strategy envisions coordinated NATO patrols in the Azov-Black Sea basin.[49] Russia has objected to this document, claiming that NATO's concentrated naval presence, particularly in Bulgaria and Romania, posed an additional threat to Russia. Since the war began, the Black Sea has seen growing militarization and geopolitical rivalry as Russia continues to maintain dominance over these waters and counter NATO's expanding influence.

Before the 2022 invasion, Russia used many of the same tactics in Ukraine that it uses in the other littoral states—interference in electoral politics, disinformation, sabotage, networks of corrupt businessmen, opaque connotations with parts of the intelligence services, and pressure from the Russian Orthodox Church with appeals to "traditional values." Since the war began,

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Russia has moved beyond tactics of influence and subversion to an all-out effort to destroy, degrade, or disrupt the flows of energy, food, water, medicines, goods, services, data, and information that sustain Ukrainian life. We discuss Russian efforts to disrupt Ukrainian food, energy and people flows in Section II. These attacks are evidence that the Kremlin is now implementing its approach known as Strategic Operation for the Destruction of Critically Important Targets, or SODCIT.[50] This concept targets the critical societal functions of a society, rather than just its military forces.

In addition, Russia has formally annexed four regions, none of whose territory it fully controls—Donetsk, Luhansk, Kherson and Zaporizhie. Russia occupies 20% of Ukrainian territory and is forcibly integrating the Ukrainian population in those territories by giving them Russian passports and making their children study a Russian curriculum and only speak Russian. It has deported 19,000 Ukrainian children to Russia, many of whom have been forcibly adopted by Russians.[51] Russian brutality has managed to unite Eastern and Western Ukrainians, including Russophone Ukrainians, in such a way that the ground for successful Russian interference in Ukrainian society and its polity has drastically shrunk. Putin's goals for Ukraine remain unchanged since the start of the war, but his actions have united Ukrainians in a hatred of Russians that could last for generations.

If the war ends, Russia may be able to regain some of its presence in the Black Sea and repair its navy. But its prospects for subjugating and controlling Ukraine remain highly questionable.

II. Russia's Efforts to Leverage Critical Black Sea Flows

Russia actively leverages critical flows of people, energy, food and other commodities across the region to amplify its influence with Black Sea states, limit Western influence, evade international restrictions on its activities, and promote its own connectivity and economy.

Moscow's 2022 invasion of Ukraine disrupted critical flows linking Russia to its Black Sea neighbors. From the Kremlin's perspective, some of these disruptions have been positive: Russia has gained global market share in grain at Ukraine's expense and enhanced its trade ties with Türkiye, South Caucasus and Central Asian states. In other ways, the invasion and Western sanctions have damaged Russia's connectivity, forced it to rely on others to sustain its war effort, and pushed it to devise several cumbersome schemes to compensate for lost influence, revenues, or critical materials. It uses Azerbaijan as an intermediary to disguise its gas trade. It has had to turn to Türkiye to maintain food and petroleum trade with the rest of the world. It has set up channels of evasion with Türkiye, Georgia, Azerbaijan, Armenia and Kyrgyzstan though which sanctioned goods can be diverted to Russia. It has created a deep-seated enmity with Ukraine that has ruptured dense connections binding both societies. It has lost influence over Moldova, Armenia, and EU members Romania and Bulgaria. Its trade and energy ties with these countries have suffered. And it faces rising competition in the Black Sea from China and the European Union.[52]

Flows of Energy

The Black Sea is a major energy crossroads, and Russia is the region's dominant oil and gas exporter. Its Black Sea port of Novorossiysk is the third-busiest in Europe; oil and oil products comprise more than 70% of its annual cargo volumes.[53]

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Russia has long sought to leverage energy flows to gain influence over Black Sea states. It has registered successes, for instance with Türkiye, but it has also suffered significant setbacks. Bulgaria has cut its near-total reliance on Russian energy and is looking to reduce those dependencies further. Kyiv has shut down gas transit through Ukraine, leaving Russia with just TurkStream and Blue Stream under the Black Sea as its only gas outlets to Europe. To evade G7 oil price cap restrictions Moscow has had to build an entire shadow fleet of tankers, many of which operate in the Black Sea. Türkiye has become a major hub for shadow fleet operations. And as the EU seeks to become independent of Russian oil and gas, Azerbaijan and Kazakhstan have become more important players. Each supplies Europe with energy across the Black Sea region, and each is looking to ways to evade dependence on Russia for those flows, although the industries in each country are deeply entwined with Russian concerns.

Oil Flows

Russia's 2022 invasion of Ukraine has transformed European oil markets. The EU banned Russian crude oil imports from December 2022, and Russian oil product imports from February 2023, with significant results: in 2021, Russia was the EU's top oil supplier, accounting for 18% of EU imports; now its share hovers at about 2%.[54] Russia has fully replaced the EU's share of its petroleum products by turning to new customers. While trade with the EU decreased by 90%, exports to China rose by 50%, grew 4 times with Türkiye, and surged 20-fold with India between 2021 and 2024.[55]

Russia has spent more than $10 billion assembling a "shadow fleet" of unregistered ships to circumvent restrictions imposed by the G7 oil price cap, maintain revenues and prevent its economy from collapse. It employs a variety of techniques to disguise tanker ownership and obscure the origin of seaborne oil, including ship-to-ship (STS) oil transfers in international waters, blending oil from many countries, spoofing ships' location data, reflagging ships, falsifying names and identities, using shell companies, and blacking out automatic identification systems. Estimates are that over 500 shadow fleet tankers operate in the Russian oil trade, accounting for 70% of Russia's total seaborne exports, including 89% of crude oil and 38% of oil product shipments.[56]

Black Sea ports have accounted consistently for about 19% of Russia's total shadow fleet crude oil shipments (Figure 1); shipments quadrupled in the two years between April 2022 and April 2024. India, China, and Türkiye account for 95% of Russian shadow tanker oil exports.[57]

Russia's Black Sea ports ship out two separate streams of crude oil. The smaller stream consists of Russian crude oil from the ports of Novorossiysk, Taman, Tuapse, as well as transshipment in and south of the Kerch Strait. The far larger stream is comprised of crude oil from a special terminal at Yuzhnaya Ozereevka, near Novorossiysk, by the Caspian Pipeline Consortium (CPC), whose shareholders include sanctioned Russian companies (36.5%), Western oil companies (32%) and Kazakhstan's state oil and gas company KazMunayGaz (20.75%). Roughly 90% of the oil flows to Yuzhnaya Ozereevka by pipeline from Kazakhstan's Tengiz oil field.[58] This stream contains 80% Kazakh oil and 20% oil produced in Kazakhstan by Lukoil.[59] Since Kazakh oil is currently not subject to sanctions, the CPC has received an exemption by the U.S. and the EU to transit and export this oil via Russian territory. 80% of Kazakh oil exports

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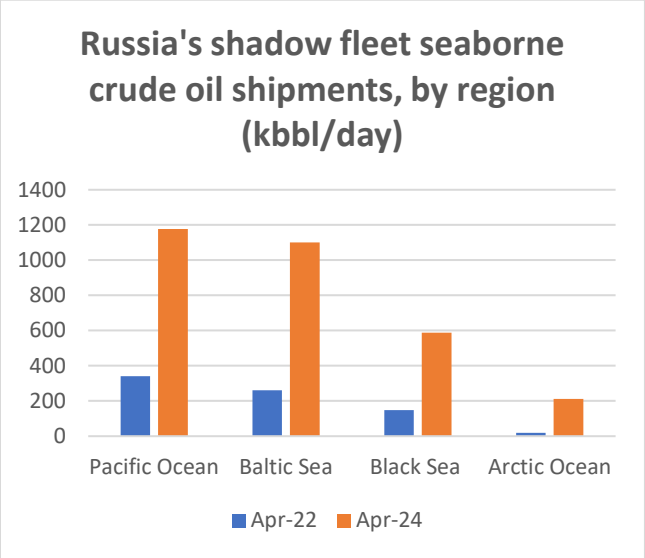
flow through this Russian terminal, making it the principal exit point for Kazakh oil to reach world markets. CPC accounts for about 2% of the world's oil. [60]

Figure 1.



Kbbl/day: thousands of barrels per day. Source: KSE Institute; Kepler; Equasis; 'IG' P&I Club webpage, https://kse.ua/wp-content/uploads/2024/06/Global-Shadow-Fleet-June-2024.pdf

Even though the CPC has major plans to expand production and export Kazakh oil via Russia, it has been subjected to ongoing efforts by Russia's state-owned Transneft and the Russian government to assert greater control over the consortium's Kazakh and Western shareholders. Since Russia's 2022 invasion of Ukraine, the CPC terminal and pipeline have faced more than 20 disruptions of activity or suspensions of oil shipments.[61] The Putin regime has either fomented or used those disruptions to warn Western customers about their consequences for global oil prices and supply. In July 2022 a Russian court ordered the CPC pipeline to shut down for one month shortly after Kazakh President Kassym-Jomart Tokayev told European Council President Charles Michel that he was ready to use his country's "hydrocarbon potential" to "stabilize the situation in the global and European markets."[62] In 2024 Russia used the pretext of payment issues to warn Kazakhstan that its oil transit to Europe could be stopped.[63] That same year Putin signed a decree threatening the seizure of properties owned by U.S. companies, including those involved in CPC, in exchange for any annexation of frozen Russian assets by the United States.[64] Three months after two Russian oil tankers collided off the coast of Port Taman in the Kerch Strait in December 2024, spilling 9,000 tons of heavy oil into the Black Sea, and one month after Ukrainian drones attacked one of the CPC oil pumping stations, Russian authorities ordered a significant reduction of CPC oil shipments from Kazakhstan. Transneft was quick to warn that CPC crude flows could fall by as much as 30% for up to two months, before the other CPC shareholders persuaded a Russian court to reverse the shutdown order.[65]

These actions have prompted the Kazakh government to explore alternate oil export routes. Its national energy company signed an agreement with Azerbaijan's SOCAR in 2022 to facilitate

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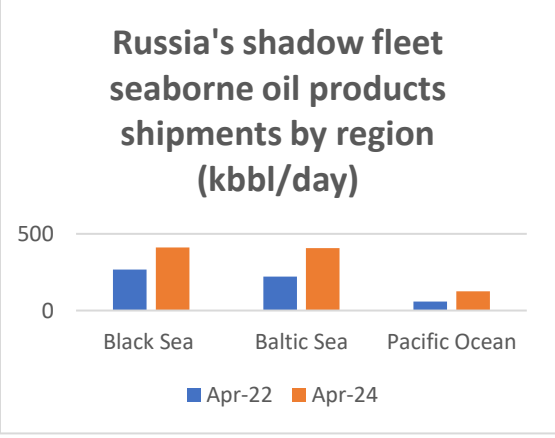
Kazakh oil transit. In January 2025 the first Kazakh oil was dispatched through the Baku-Tbilisi-Ceyhan (BTC) oil pipeline, which bypasses Russia, even though the costs are three times higher. Kazakhstan intends to increase oil shipments via the BTC pipeline to 20 million tons per year – a significant rise from the current 1.5 million tons. Kazakhstan is also considering the Baku-Supsa pipeline that connects Baku on the Caspian to Georgia's Black Sea coast and has a capacity of up to five million tons of oil per year. If these initiatives develop further, Kazakhstan would diminish its reliance on Russia while significantly boosting its oil exports to Europe. Yet Russia is likely to pressure Kazakhstan not to turn away from what has become a lucrative energy channel for Moscow.[66]

Map 2. The Caspian Pipeline Consortium (CPC)

Source: © Guido Grassow/Wikimedia Commons, https://commons.wikimedia.org.

Russia's Black Sea ports of Novorossiysk, Tuapse, Taman, Kakaz and several smaller terminals on the Azov Sea have played a more important role in shadow fleet shipments of oil products, accounting for 49% of the global total in April 2022, falling slightly to 44% by April 2024 (Figure 2). Türkiye, China and Brazil are the main buyers of Russian shadow tanker oil products.[67]

Figure 2.



Kbbl/day: thousands of barrels per day. Source: KSE Institute; Kepler; Equasis; 'IG' P&I Club webpage, *https://kse.ua/wp-content/uploads/2024/06/Global-Shadow-Fleet-June-2024.pdf*

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Roughly one third of Russia's Black Sea oil product shipments flows to Türkiye, which has become the world's largest buyer of Russian refined oil products, accounting for 25% of Russia's total oil product exports between December 2022 and February 2025.[68] Many of these imports are re-labeled in Türkiye and then re-exported to other countries, enabling Russia to evade the EU's ban on Russian oil product imports and generate billions in tax revenues. For instance, the three Turkish ports of Ceyhan, Marmara Ereglisi and Mersin have no refining hubs, and yet have been importing 86% of their oil products from Russia.[69]

Russia's Black Sea oil and oil products trade with other countries has also shifted significantly. Ukraine has stopped Russian oil imports. Romania has sought to diversify its oil-related imports away from Russia, yet it imports over $1 billion annually in re-labeled Russian oil products shipped via Türkiye. Moreover, the shallow Black Sea waters just outside Romania's maritime zone account for roughly a third of Russia's shadow fleet ship-to-ship oil transfers.[70] Romania has greatly increased its imports of crude oil and related products from Azerbaijan, registering a 73% increase in volume in February 2025 over the previous year, making Romania the fifth-largest importer of Azerbaijan's crude oil products. It imports oil products from the STAR refinery in Azerbaijan, yet over 90% of the crude oil from which STAR makes products like jet fuel, petroleum, and diesel come from Russia. The refinery has become an increasingly important revenue generator for Moscow.[71]

Prior to Russia's war against Ukraine, Bulgaria was nearly completely dependent on gas and oil imports from Moscow. It imported 3 million barrels of Russian oil a month, making it the world's fourth-largest buyer of Moscow's crude after India, China and Türkiye. Lukoil's Neftochim refinery in Bulgaria's Black Sea port city of Burgas and its nearby Rosenets oil import terminal provided 80% of Bulgaria's diesel and gasoline needs and accounted 10% of its GDP. Lukoil translated leveraged its economic footprint by financing media and political parties to generate considerable influence over Bulgaria's political and economic elite.[72]

After the war began, the EU granted Sofia an exemption from the EU-wide embargo on Russian oil imports until the end of 2024. Bulgarian oil imports from Russia surged as a result, enabling Russia to sell oil indirectly to third parties. Lukoil's Bulgarian operations processed Russian oil that generated more than $1 billion in direct tax revenue for the Kremlin until Bulgaria nationalized the plant in September 2023 and then imposed a 60% tax on the refinery's profits. Even after this, the refinery continued to process Russian oil via shadow fleet transfers offshore near the coast of Bulgaria, and Lukoil reportedly continued its influence activities. Bulgaria is now replacing Russian oil imports with crude from Kazakhstan, Iraq and Tunisia.[73] Lukoil has put its refinery up for sale, with Kazakhstan's state-owned company KazMunayGaz and Hungarian energy group MOL among the bidders. Since MOL's financial capacity is limited, Russian financing could be involved. A final decision is expected this year.[74]

Meanwhile, Georgian imports of oil and oil products from Russia have surged. A good deal of this is likely due to Georgian buyers deciding to purchase cheaper Russian oil and fuel rather than from domestic sources. Several investigations indicate, however, that Georgia has become an intermediary for some portion of these Russian flows that go on to Europe and other

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destinations, either via ship-to-ship transfers, blending Russian and Georgian oil, or re-labeling Russian oil as Georgian oil.[75]

Gas Flows

The Black Sea is a major crossroads for flows of natural gas. Russia is the dominant player, but its invasion of Ukraine and its seizure of significant Ukrainian assets has scrambled gas trade across the region. Russian gas exports to Black Sea countries fell 67% from the year before the invasion in 2021 to the year after the invasion in 2023. Ukraine and Romania cut off their Russian gas imports and Bulgaria reduced them by 78%. Bulgaria's decline is noteworthy given its historical role as a re-exporter of Russian gas to the EU. By contrast, trade with Georgia increased by 45% over the same period. Türkiye experienced the most dramatic transformation, with imports from Russia surging nearly 17-fold in 2023 compared to 2021.[76] In the short term, Türkiye has helped Russia get its gas to world markets, a problem exacerbated by the dismantling of the Nord Stream underwater infrastructure and reluctance by some countries to engage in gas transactions with Russia.[77] In the long term, however, Black Sea gas riches could enable Türkiye and other Black Sea countries to lower further their dependence on Russian gas.

Gas Flows: Russian Activities

In the post-Soviet years Russia used Ukraine as a key transit route for its gas exports to Europe. Russian gas supplies were also critical to Ukraine itself, as its domestic production met only one-fourth of the country's needs. Moscow used these energy ties as important levers of influence over elites not only in Ukraine, but in EU members Austria, Hungary, and Slovakia, each of which had developed significant dependencies on Russian gas via this transit route. Russian gas supply disruptions to Ukraine in 2006 and 2009 underscored how vulnerable Ukraine and other European countries were to Russia's use of the energy weapon. At the same time, Moscow sought to minimize Ukraine's importance to its own gas exports by building new pipelines, including Nord Stream in the Baltic Sea and South Stream and Turk Stream in the Black Sea.[78]

Ukraine's decades-long effort to reduce its gas consumption and its energy dependence on Russia enabled Kyiv to stop importing gas directly from Russia some months after Moscow illegally annexed Crimea and intervened in the Donbas in 2014. Ukraine switched to gas imports from Poland, Hungary, and Slovakia – although much of that gas was in fact Russian gas exported to Central Europe, from where it was exported back to Ukraine.[79]

Russia's approach changed fundamentally when it invaded Ukraine in 2022 and has since acted to occupy, disrupt or destroy Ukraine's energy infrastructure. The gas transit agreement between Russia's Gazprom and Ukraine's Naftogaz continued despite the war until Ukraine opted not to renew it at the end of 2024, thus cutting off Russian gas accounting for 5% of the EU's gas supply.[80] Given that South Stream was abandoned after Russia's 2014 intervention in Ukraine, and Nord Stream collapsed amidst Russia's 2022 invasion, Russia's last pipeline gas routes to Europe are now TurkStream and Blue Stream, which run under the Black Sea to Türkiye and on to supply Bulgaria, Hungary, Romania, Serbia, Greece, North Macedonia, and Bosnia and Herzegovina.[81]

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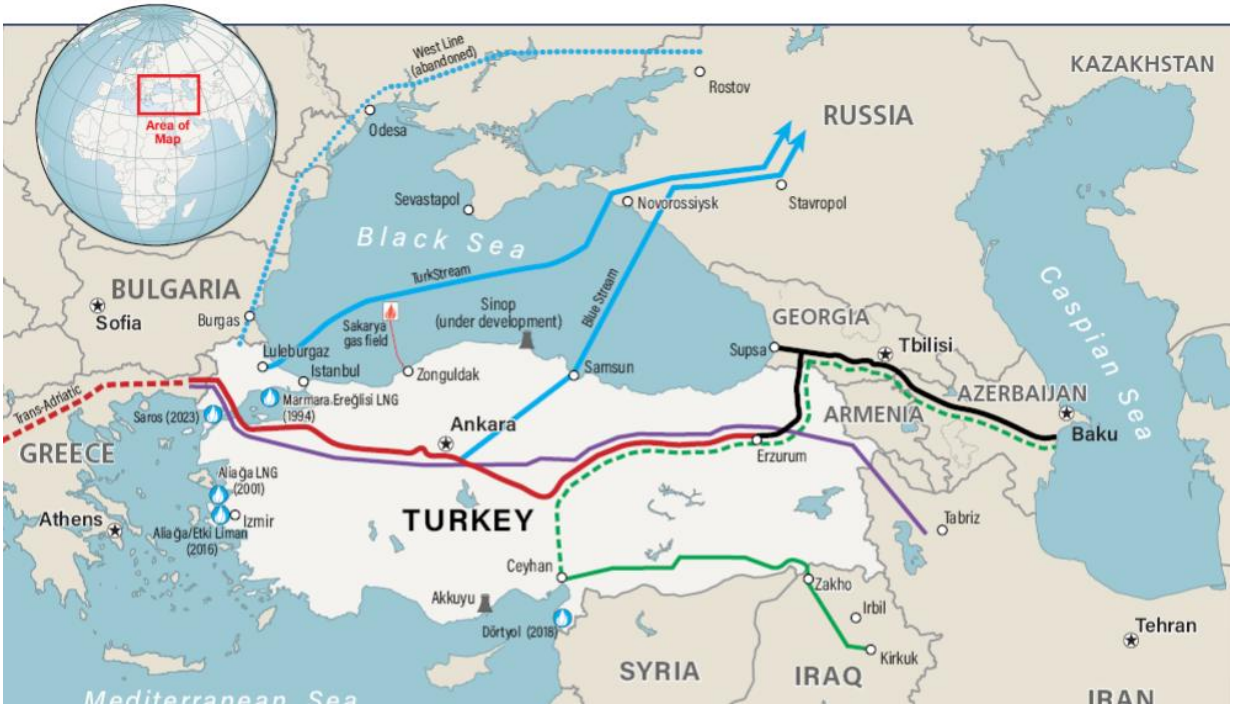
Map 3. Gas Flows in the Black Sea Region



Blue: TurkStream and Blue Stream: Russia-Türkiye (West Line abandoned)
Red: Trans-Anatolian Natural Gas Pipeline
Black: Baku-Tbilisi-Erzurum Natural Gas Pipeline
Green: Oil pipelines Azerbaijan-Türkiye and Iraq-Türkiye
Source: https://carnegieendowment.org/research/2024/02/understanding-the-energy-drivers-of-turkeys-foreign-policy?lang=en&center=india.

Moldova has suffered the most from the end of Russian gas transit through Ukraine. Hardest hit is its pro-Russian separatist region of Transnistria. Putin sought to blame Ukraine and to sway Moldovans with high utility bills to vote for pro-Kremlin parties, but the cutoff deprived the Kremlin of its primary instrument to keep Transnistria within its orbit and to destabilize Moldova. The European Commission and EU member states stepped in with aid to help Moldova, including Transnistria, to weather the crisis.[82]

Russia's leverage in Moldova stems from an energy transfer system it designed that supplies Transnistria with free Russian gas, which it uses to supply the rest of Moldova, which then pays for the gas via MoldovaGaz, which is 50% owned by Gazprom, 35% by the Moldovan government, and 13% by entities in Transnistria. Debts accruing from Transnistria's free gas consumption – now exceeding $11 billion – are placed on MoldovaGaz, thus generating high dependencies on Gazprom and enabling Russian actors to corrupt Moldovan elites and stymie their efforts to diversify Moldova's energy supplies. Russia's leverage could now diminish, however, in part due to the current crisis, in part because Moldova this year will have a new power line bypassing the Transnistria region, and also because the current contract between MoldovaGaz and Gazprom, which expires in September 2026, could be terminated by a pro-

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Western Moldovan government. The fate of pro-Russian political parties in Moldova's parliamentary elections in fall 2025 could prove decisive, with the Kremlin working hard to manipulate the results.[83]

Russian influence has also diminished in Bulgaria, the other Black Sea country most affected by Russian energy flow disruptions. Before Russia's invasion of Ukraine, Bulgaria depended on Russia for roughly 95% of its natural gas. In 2022 the Kremlin demanded that Bulgaria pay for gas imports in rubles. When Bulgaria refused, Moscow cut off Russian deliveries. Bulgaria now imports no Russian gas directly, although it does import gas from Azerbaijan, some of which could originate in Russia. Bulgaria more important role is as a transit country for Turk Stream gas flowing to other European countries. Sofia is also working to supplant its multi-billion-dollar trade in nuclear fuel with Russia with contracts with Westinghouse, a U.S. company.[84]

Gas Flows: Future Prospects

Going forward, Russia's overall influence over Black Sea energy flows will be tied to the ability of other Black Sea countries to exploit the region's significant natural gas deposits. In 2023, the U.S. Geological Survey estimated that there were 3 trillion cubic meters of undiscovered, technically recoverable gas resources in the Black Sea – roughly the same as estimates for the Eastern Mediterranean. Efforts to tap these resources have slowed down because sea mines drift close to offshore rigs, and because of active Kremlin efforts to undermine or influence such initiatives.[85]

Türkiye imports all its gas. Russia is its top supplier, providing more than 50% of its pipeline imports, for which it receives $325 million to $850 million a month. Türkiye is also important to Russia, because it is the sole remaining export route for Russian pipeline gas to Europe and because it controls the exit from the Black Sea, which allows it to influence such things as insurance prices for gas tankers.[86]

Turkish President Erdoğan has sought to position Türkiye as an energy hub, connecting natural gas producers to its east and south with markets to the west. Russia has blown hot and cold on such efforts in the past, but now has fewer options. It faces additional Turkish efforts to diminish Russian influence and dependence on Russian supplies of natural gas, coal and oil products while enhancing Türkiye's position as an energy crossroads.[87]

First, Russia will face Türkiye's efforts to negotiate better terms with Gazprom this year: the Blue Stream and TurkStream supply contracts expire at the end of 2025.[88] These negotiations will be held under a further cloud of uncertainty, following U.S. imposition of sanctions on Gazprombank in December 2024. The U.S. granted Türkiye a three-month waiver for its gas payments with the bank. This exemption could be extended again, but it could be revoked at any time.

Second, to Russia's dismay, Türkiye and Turkmenistan agreed in February 2025 to enable Turkmen gas to flow to Türkiye via Iran's existing gas infrastructure network, something Moscow had long opposed. Ankara is also looking to facilitate a gas pipeline across the Caspian Sea from Turkmenistan to Azerbaijan and then on to Türkiye – bypassing Russia.[89]

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Third, Türkiye is actively working to tap its considerable offshore gas reserves in the Black Sea, which may be as high as 710 billion cubic meters. Tapping into even just a fraction of these reserves could drastically curtail Turkish reliance on Russian gas exports, which currently amount to 27 billion cubic meters annually.[90]

Fourth, Türkiye is developing infrastructure needed to process, store, and distribute liquefied natural gas (LNG), which could make the country more resilient to energy disruptions and give it more options in terms of its energy imports, including from suppliers other than Russia.[91]

Finally, sanctions have pressed Moscow so much that it has proposed that Türkiye, instead of Russia's Rosatom, build portions of the joint flagship $20 billion Akkuyu nuclear plant, in exchange for which Rosatom would pay the equivalent amount in rubles to Gazprom, which would deduct those monies from Ankara's monthly gas bill. The proposed swap is an example of Russia's creative ways to sidestep the sanctions regime, but it also gives Ankara additional leverage in its dealings with Moscow.[92]

Russia's gas position in the Black Sea region is also likely to be challenged by Romania, which already meets about 80% of its gas needs from domestic production. Its Black Sea gas discoveries of 150-200 billion cubic meters, once fully exploited, could lead it to be the EU's largest gas producer. It will be able not only to cover its own natural gas needs but also those of neighboring countries, diminishing their reliance on Russian gas via TurkStream.

While Romania's gas resources are being developed by Western companies, Russian entities are seeking to gain influence. One recent example is Romanian government scrutiny of the security risks stemming from a planned purchase? (sale?) of E.ON's Romanian energy subsidiary to Hungary's MVM, which gets most of its gas from Russia. Romania's energy ministry has accused Russia of exercising "decisive influence, shadow control, influence by economic dependence and effective control" over MVM.[93]

Russia's invasion of Ukraine was prompted in part by its interest in gaining control of Ukraine's gas resources, which at 3.6 trillion cubic meters are among the largest in Europe. Ukraine's eastern Dnieper-Donetsk region is home to about 80% of Ukraine's proven natural gas reserves, 90% of its gas production, and considerable unproven shale gas resources. Russia seized control of 6% of Ukraine's estimated gas resource base in the Black Sea and Sea of Azov area.

The war has limited Ukraine's ability to fully exploit its on- and offshore gas resources, but if and when it could do so it could become a major gas power, further diminishing Russian influence in the region.[94]

Bulgaria and Georgia also have potentially significant gas reserves. One of Bulgaria's as-yet unexplored fields, Khan Asparuh, is thought to contain 100 bcm. If correct, these reserves alone could cover the country's annual demand for more than 30 years. Sofia has recently signed contracts with Western energy companies to explore its Black Sea offshore fields.[95] Georgia may have overall recoverable gas resources of 266 bcm, although how much of these reserves lie in its Black Sea economic zone has yet to be determined.[96] Romania, Bulgaria and Georgia are also seeking other sources of energy across the Black Sea that bypass Russia. They are working with Azerbaijan to construct the Black Sea Energy submarine cable that would connect Azerbaijan's vast renewable energy resources to Europe's energy grid via Georgia and Romania. The

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proposed $2.5 billion undersea cable, expected to span approximately 1,195 kilometers (1,100 underwater)—about the distance from Paris to Berlin—will be the longest of its kind in the world, with a transmission capacity of 4 gigawatts of electricity annually, a significant portion of which would be generated from renewable sources.[97]

In short, Russia's short-term ability to leverage current gas flows to its advantage has been curtailed by its invasion of Ukraine, and its long-term ability to maintain such influence is questionable given rich gas resources available to other Black Sea countries who are determined to free themselves from reliance on Moscow.

Food Flows

Former Russian president Dmitry Medvedev says that food is Russia's "silent weapon,"[98] and Moscow describes grain as its "second oil."[99] Russia has used flows of food to enhance its revenues, create new markets, forge commodity trading systems less reliant on the U.S. dollar, gain influence in recipient countries, pressure adversaries, evade sanctions, and disrupt or destroy competitors, particularly Ukraine. Russia's war against Ukraine has disrupted global agriculture, energy, and fertilizer markets, generating food insecurity for millions of people.[100]

The Black Sea region is a significant agricultural producer and a major throughfare for agricultural commodities. Before Russia's 2022 invasion of Ukraine, the Black Sea region accounted for 30% of world wheat exports, as well as 20% of corn and 75% of sunflower oil.[101]

The Black Sea is immensely important to the Kremlin's food policies. Russia exports nearly 90% of its grain exports and a significant proportion of its fertilizer and other goods through its Black Sea ports, including to many countries that have not signed on to international sanctions.[102]

The Black Sea is even more consequential for Ukraine's agriculture. Before the war began, over 50% of Ukraine's total exports and around 90% of Ukraine's grain left through the country's ports on the Black Sea.[103] Ukrainian grain fed more than 400 million people worldwide. In the three years immediately before the war, Ukraine accounted for almost 10% of the world's exports of wheat, 15% of its corn, 15% of its barley, and 50% of its sunflower oil. Agriculture-related industries accounted for about 20% of Ukraine's GDP, 40% of its export income, and 14% of its jobs.[104]

Agriculture and food security are central to Russia's war strategy. Russia's war against Ukraine has caused what experts have called the greatest military-related disruption to global agricultural markets in at least a century.[105] Russia has targeted Ukraine's agriculture and its related infrastructure to undercut a primary source of the country's revenue and to demoralize its population. Moscow has targeted Ukrainian grain and port facilities with air strikes, a potential war crime. The war has forced Ukrainian farmers to abandon their fields and contaminated an estimated 2.8 million hectares of Ukrainian farmland. Russian forces occupy several Ukrainian Black Sea ports, including Mariupol and Berdyansk. Russia's occupation of the left bank of the Dnipro river rendered the port of Mikolaiv inoperational. Ukraine's remaining Black Sea grain ports around Odesa are under constant Russian threat. In fall of 2024 they were attacked 60 times; 300 port facilities and grain storages, 177 vehicles and 22 ships were damaged.[106]

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The result: Ukrainian food production, revenue and exports have fallen while Russian suppliers have thrived. Vladimir Putin says that Moscow wants to "replace Ukrainian grain" with Russian grain. Russia's share in world wheat exports has risen to 25%, up from 20% before the war.[107]

Moscow has partially offset falling EU demand for Russian wheat by expanding exports to Türkiye, one of its largest customers. Türkiye has significantly increased imports of food products from Russia and subsequently exported these goods, either in their original form or after processing into secondary products.[108] As mentioned earlier, Turkish president Erdoğan helped to broker the Black Sea Grain Initiative in July 2022, which helped to alleviate the global food crisis triggered by Russia's invasion. Russia allowed Ukrainian grain exports to resume, and in exchange the UN pledged to facilitate Russian agricultural exports hampered by Western sanctions. Russia sought further concessions: resumption of its ammonia exports, unblocking the assets and accounts of Russian food and fertilizer exporters, reconnection of its state agricultural bank Rosselkhozbank to the SWIFT international payments system, and resumption of agricultural machinery and parts supplies. When these demands were not met, Moscow withdrew from the Initiative in July 2023 and resumed bombing Ukrainian ports. The EU stepped up by abolishing tariffs on Ukrainian goods and by creating so-called "solidarity lanes" to help Ukraine send its agricultural goods overland along the Danube. Russia has also bombed these routes, and several EU member states are opposed to extending Ukraine's trade privileges after the current arrangement expires in early June 2025. To evade Russia's destruction, Ukraine has turned to a risky and costly shipping route that skirts the coastline of the Western Black Sea, traversing the territorial waters of Romania. Washington has engaged both parties this year in discussions about resuming the Grain Initiative; prospects are uncertain.[109]

The war has not been cost-free for Russia; Russian grain vessels have seen higher insurance charges, lower profits, and skittish buyers afraid that they could be subjected to secondary sanctions. Sanctions have also revealed the nature of Russia's dependence on imported farm inputs such as seeds, crop protection chemicals and agricultural machinery, and forced Russia to procure those commodities and components through costly and cumbersome arrangements with third countries. Russia has tried with only limited success to establish a barter trade system in bulk commodities that circumvents sanctions restrictions and enables trade with countries that do not adhere to Western sanctions.[110]

Moscow has employed food flows to discipline Georgia and Moldova when it believes either Tbilisi or Chisinau is diverging from Moscow's priorities or to becoming too close to Europe or the United States. Georgia is highly dependent on food imports from Russia, relying on Russia for 95% of its imported wheat. Russia has routinely imposed wheat export bans. While these have often been motivated by domestic food security concerns or have been attempts to influence global prices, they have roiled the Georgian economy. Russia also accounts for about 70% of Georgia's wine exports, and wine accounts for about 10% of Georgia's economy. When the Georgian government sought to deepen ties with the EU and NATO in 2006, Moscow banned Georgian wine and mineral water until after the pro-Moscow Georgian Dream coalition won the country's 2012 parliamentary elections. When protests against Moscow's influence erupted on the streets of Tbilisi in 2019, Moscow again tightened controls on Georgian wines. In recent months Russia has banned food imports from Georgia's breakaway region of Abkhazia amidst deteriorating relations with Abkhaz authorities, as we discuss in Box 1. Georgia has been unable

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to break its dependence on Russian wheat imports, but has had more success diversifying its wine markets.[111]

Moldova is less dependent on Russia for food imports, but Russia has been a major market for Moldovan wine exports, and wine represents 25% of Moldova's economy. As with Georgia, Russia banned Moldovan wine sales in 2006. It imposed a fresh ban in 2013 just days before Chisinau was due to conclude political association and free trade deals with the EU. Moldova has been relatively successful in diversifying its wine exports to other markets in response to Russia's pressure tactics.[112]

Flows of People

Russia has generated dramatic flows of people across the Black Sea region primarily by its acts of aggression in Georgia in 2002 and in Ukraine in 2014 and 2022. These actions and their consequences have rippled back to Moscow, generating significant flows of people within and from the Russian Federation itself. Russia is also supporting smugglers and physically moving displaced people to EU borders, thereby straining European capacities and fueling the image of migrants as a threat to European countries. Frontex, the EU's border police, has charged Russia with using migration "as a lever in a larger game of influence and pressure."[113]

Russian manipulation of people flows has a long historical pedigree. The Russian Empire in the 19th century and especially the Soviet Union in the 20th century instrumentalized population flows to change the ethnic composition of territories, privilege ethnic Russians, punish political opponents, and bring laborers or skilled specialists to underdeveloped regions of the country. Additional flows of people were generated by Moscow's active foment of ethnic conflict after the Soviet Union collapsed and new post-Soviet countries emerged.[114]

Today's Russia continues to instrumentalize flows of people. Its occupation of Crimea and intervention in the Donbas in 2014, which uprooted 1.5 million persons within Ukraine, was compounded by its full-scale war in 2022, which has generated Europe's largest population displacement crisis since World War II. Russia's tactic of targeting Ukrainian civil society and its civilian infrastructure has generated waves of migrants inside the country and pushed many to head toward neighboring countries, straining those countries' services and EU political unity. Nearly a third of Ukraine's population was forced to flee their homes. The UN Refugee Agency estimates that there are 3.7 million internally displaced persons (IDPs) in Ukraine. Many initially fled to western Ukraine, but now Kyiv and central Ukraine are accommodating more IDPs.[115]

An additional 6.37 million Ukrainians have fled elsewhere in Europe, and another 560,200 have left Europe for other continents. Germany has welcomed the greatest number of Ukrainian refugees (1.2 million), followed by Poland (1 million) and the Czech Republic (400,000). Countries with more than 100,000 forced migrants also include the United Kingdom, Spain, the United States, Canada, Romania, Italy, Slovakia, Moldova, the Netherlands, and Ireland. Most migrants are women and children.[116]

In occupied Crimea, Russia has updated Soviet resettlement practices to forcibly marginalize the ethnic Ukrainian and Crimean Tatar communities and entrench ethnic Russian domination of the peninsula. Measures include forced deportations, persecution and imprisonment of pro-Ukrainian activists, eliminating the Ukrainian language from school curricula, closing most Ukrainian

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Orthodox churches, and the unlawful conscription of at least 30,000 Crimean men into the Russian military. Russian citizenship was automatically given to permanent residents of Crimea; those who refused not only lost rights to jobs, health care and property, they were considered "stateless" and required to register with Russia's Internal Affairs Ministry. Thousands of people reacted to these policies by leaving for Ukrainian-held lands. At the same time, Russian authorities have resettled at least 800,000 Russians in Crimea as a means to forcibly alter the demographic composition of the peninsula – actions that are considered war crimes under international law. Ukrainian experts believe the numbers are closer to 1 million, and that the Russian authorities have replaced more than 35% of the peninsula's population. A large number of military personnel, employees of the federal government, local and federal executive branch agencies and members of their families are moving to Crimea without changing their permanent registration in Russian passports (because of the fear of being sanctioned), and thus they are not included in official statistics. Reports surfaced of a special Russian government offer to pay $30,000 to *siloviki* (security services personnel) to move their families to Crimea.[117]

The pattern is similar in the other Ukrainian territories Russia has occupied since February 2022: it is turning Ukrainians into Russians and bringing in more people from Russia. Russia presented local residents with a choice: obtain Russian citizenship, risk retribution, or leave their native land. New laws stipulated that anyone in the occupied territories who did not have a Russian passport by July 1, 2024 would be subject to deportation as a "foreign citizen." Individuals need a Russian passport to prove property ownership, use banks, drive vehicles, get married, receive health care and retirement income. Individuals applying for a Russian passport have submit biometric data and cell phone information and swear an oath of loyalty – despite the fact that under international law it is forbidden to force people "to swear allegiance to the hostile Power." Men who accept a Russian passport can be drafted to fight Ukraine. Refusal could result in losing custody of children, jail – or worse. Russia has also offered incentives: a 100,000-ruble ($1,000) stipend to leave the occupied territory and move to Russia, humanitarian aid, "residential certificates," pensions for retirees, and money for parents of newborns – with Russian birth certificates. As a result of these policies, essentially all of those living in the occupied territories now have Russian passports. And each new citizen allows Russia to claim a right – however falsely – to defend its own people against a hostile neighbor. In addition, Moscow is offering very low mortgage rates for anyone from Russia who wants to move to the occupied territories, replacing the Ukrainian doctors, nurses, teachers, police and municipal workers who are now gone. By populating occupied regions with Russian residents, Russia increasingly cements its hold on territories it has seized by force in what many Ukrainians describe as ethnic cleansing. These transformative migration flows also enable the occupying authorities to create a Trojan Horse against any future efforts by Kyiv to return the occupied territories to its control.[118]

Throughout the occupied territories, Russia has deported hundreds of thousands of people to Russia.[119] It has relocated families under the pretext of evacuation from the war zone, transferred prisoners to Russian prisons, and deliberately created unacceptable living conditions for Ukrainian citizens considered unreliable by the occupiers while offering them housing vouchers, employment assistance or related schemes to resettle in Russia. It has been conducting a large-scale, systematic campaign that has deported at least 19,000 Ukrainian children from their homes or from orphanages to Russia, where it seeks to rob them of their Ukrainian roots via a network

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of camps and foster homes, and where they are subjected to indoctrination and in many cases assigned new Russian names. These practices, which Kyiv has called "the largest kidnapping campaign in modern history," have been judged a war crime by the International Criminal Court, which has issued an arrest warrant for Vladimir Putin and Russian Presidential Commissioner for Children's Rights Maria Lvova-Belova. Russia denies it has forcibly transferred children.[120]

Georgia's ongoing efforts to contend with mass displacement of persons within its borders are related to its relations with Russia. An initial wave of IDPs was generated by the collapse of the Soviet Union. Armed conflicts in Abkhazia and in Tskhinvali in South Ossetia in the early 1990s caused hundreds of thousands to flee their native lands to other parts of Georgia. Over two decades later, most remain displaced. A second wave of IDPs was created by Russia's August 2008 war over South Ossetia. As a result of these crises, roughly 290,000 people, representing 8% of Georgia's population, are internally displaced. IDPs face persistent housing challenges. Government assistance is insufficient for basic needs. Roughly three-quarters of IDPs are unemployed. This situation contributes to the unsettled nature of Georgian political life, offering Moscow opportunities for influence.[121]

While Moscow has actively fomented mass waves of people in other countries, its invasion of Ukraine in 2022 has forced it to contend with the largest emigration from Russia since the Bolshevik Revolution of 1917. Over 800,000 people are estimated to have left Russia since the start of the war, relocating to diverse destinations including Kazakhstan, Georgia, Armenia, Serbia, Türkiye and Germany. Motivations include fear of political repression, avoidance of military conscription, and economic concerns. Though no accurate numbers on return migration are available, researchers estimate that around 15% of Russians who fled abroad in 2022 have since returned home.[122]

This wave of Russian emigration is also affecting Black Sea countries. Countries such as Türkiye and Georgia, which were initially welcoming, have imposed restrictions. In Türkiye, more than 150,000 Russian citizens applied for residence permits in 2022, prompting over 1,000 municipalities across the country to stop issuing and extending permits to Russians. In Georgia, where Russians can be in the country for one year without a visa, border guards have denied Russians already residing in the country from re-entering Georgia. Social tensions have grown, and Georgian public opinion is highly negative toward Russian in-migration.[123]

Alternate Flows of Goods

Russia's war and related international sanctions have so disrupted traditional transport routes that renewed attention is being paid to two transport routes crisscrossing the Caspian likely that could further shape flows of goods between Russia and its Black Sea neighbors.

The most developed route is the Middle Corridor, also known as the Trans-Caspian International Transport Route (TITR), which consists of a network of interconnected road, rail, and sea routes that go from the Black Sea and the Caucasus to Central Asia, the markets of China and East and Central Asia to the Caucasus and then on to Europe via Georgian ports or from Türkiye. The TITR, long favored by China, is now benefiting from major investments by the EU in part because it bypasses both Russia and Iran. As a result, the volume of goods transported via the Middle Corridor in 2024 surged by 62%, reaching 4.5 million tons. The World Bank estimates

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that by 2030 TITR trade volumes between Europe and China could triple and travel times be cut in half.[124]

The less developed route is the Russia-inspired International North-South Transport Corridor (INSTC), a multimodal transport route connecting Russia to the Indian Ocean. The INSTC, which has long suffered from neglect and underinvestment, has become more important to Russia as its economic ties with Europe deteriorate and its trade with India, Iran and the Caucasus become more important. In addition, the INSTC's western route passes through Azerbaijan, where it intersects with the TITR, thus offering Russia the potential to tap into both east-west and north-south trade flows. A recent indication of Russia's interest was its agreement in February 2025 to help Iran complete the long-delayed Rasht-Astara railway in Iran, which has been the missing link in a critical INSTC route. Nonetheless, even under the best circumstances it will take years to realize that project, and other portions of the INSTC need costly modernization. Moreover, Iran could be subjected to further pressures by the United States and Europe, the EU is unlikely to want to facilitate Russia's connectivity with the Middle Corridor, and Russia's aims could be thwarted by China-India tensions over their respective trade routes.[125]

Map 4. Trans-Caspian International Transportation Route (TITR)

Map 5. International North-South Transport Corridor (INSTC)

Source: © Tanvir Anjum Adib/Wikimedia Commons, https://commons.wikimedia.org.

III. The Regional Impact of Russia's Black Sea Ambitions: The South Caucasus, the Middle East, and the Mediterranean

Moscow views the Black Sea as an important springboard for projecting power and influence into the South Caucasus, the Middle East, and the Mediterranean.[126]

The South Caucasus

Russia's geopolitical ambition to dominate the Black Sea and beyond extends to the three South Caucasus states—Georgia, Armenia and Azerbaijan—because of their central role as transportation corridors and their ties with other regional players such as Türkiye and Iran. Russia's military buildup in Crimea, the modernization of its naval forces, and its deployment of more troops to the Southern Military District are designed to secure Russia's southwestern flank from attack, dissuade and intimidate neighbors, and support wider power projection to the Middle East.[127] Further Russian goals in the South Caucasus are to limit Western influence,

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degrade multilateral organizations which Russia does not control or heavily influence, and to benefit economically from these states.

The strategic importance of the South Caucasus for Russia has changed since Russia invaded Ukraine in February 2022. Russia now appears to have accepted that it is no longer the regional hegemon -- at least for the time being – although it remains a significant player among several others.[128]

Russia's war with Ukraine has limited its capacity for active involvement in the South Caucasus. It is now investing in looser relationships to limit Western influence in the region, notably the "3+3" format for peace and regional cooperation, consisting of Russia, Iran and Türkiye plus Armenia and Azerbaijan—and aspirationally Georgia.[129] This group does not include any Western countries or multilateral organizations. Georgia has rejected Russian pressure and has so far refused to join the group. Armenia participates reluctantly. The participating countries have met three times so far, in December 2021 in Moscow, in Tehran in October 2023, and in Istanbul in October 2024. All three meetings focused heavily on anti-Western rhetoric, with Russian foreign minister Sergei Lavrov accusing outside forces of seeking to impose their will on the region and promoting "NATO-centric formats" against the interests of the participating states.[130] Meanwhile, Georgia, Armenia and Azerbaijan in April 2025 resumed their own trilateral format for discussions, not only to enhance regional cooperation but to enhance each state's maneuverability. While the potential for such a format may be limited, it is another sign of regional actors seeking to diversify their relations away from Moscow. [131]

Western sanctions on Russia since 2022 have changed Russia's economic relations with the three South Caucasus countries. Russia has realized that it needs to diversify the range of its economic partners and of its trade routes. With Western trade links cut off, Russia has had to focus on southern routes that go to the Middle East and South Asia. Russian trade routes have pivoted from the West to the East and South, raising the importance of the South Caucasus. Since 2022, economic ties between Russia and the three states have grown. Russia's main priority is to replace and import goods which it no longer imports from the West. In practice, that has meant the re-export of items such as automobiles, household goods and, most controversially, dual-use items that could also be used for military purposes. Indeed, there is considerable evidence that individuals and companies in the three South Caucasus states have helped Russia evade sanctions.[132]

Exports from all three countries to Russia have increased. Trade between the two adversaries--Azerbaijan and Armenia--has more than doubled. Armenia remains reliant on Russia as the main importer of its goods and key supplier of cheap gas, nuclear fuel, and food products. Azerbaijan, whose relations with Russia have improved significantly since 2022, has become a more important economic partner for Russia. As discussed in Section II, it is crucial both as an energy partner and transit route for Russia in the INSTC, the importance of which continues to grow.

Russia will continue to try to persuade Azerbaijan that North-South connectivity is more important for Baku than the East-West projects promoted by Türkiye, China and the West. As part of this project, rail, road and customs infrastructure between Azerbaijan and Russia has been upgraded. The project is also designed to strengthen Russia's ties to Iran. Iran has become an increasingly important partner for Moscow in its war with Ukraine, providing drones and other

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weapons for Russia's military.[133] The two countries signed a treaty of strategic partnership in January 2025 which, while falling short of a mutual defense treaty such as Russia has with North Korea, nevertheless signaled an upgrading of ties.[134] Nevertheless, questions remain over whether Iran and Russia can afford the infrastructure upgrades needed to make the North-South corridor work.

Georgia's direct trade with Russia has risen much less. But its exports to Eurasian Economic Union countries have risen markedly, suggesting that many of these goods are then re-exported to Russia.

Russia's ties with Armenia and Azerbaijan have changed dramatically since the second Karabakh conflict of 2020 and since the start of the 2022 Ukraine war. Armenia used to view Russia as its protector and partner, especially against Azerbaijan. This began to change when Armenia experienced its own "color" revolution in 2018 and Nikol Pashinyan came to power.[135] Russia had not put him in power and, even though he made a point of stressing his loyalty to Moscow, Putin remained suspicious of him. During the 2020 war, Putin blamed Pashinyan for the loss of territory in Nagorno-Karabakh.[136] And in 2023 Russia did nothing to prevent Azerbaijan from defeating Armenia, taking over Nagorno-Karabakh and forcing Armenians to flee the enclave in which they lived. For more than three decades, Russia had used this "frozen conflict" to exercise leverage over both protagonists, but it abandoned this strategy in 2023. The agreement on a text of a draft peace agreement between Baku and Yerevan in March 2025—which has yet to be signed and ratified—was achieved through bilateral negotiations, without the involvement of Moscow.

While Russia's ties to Armenia have deteriorated, its relations with Azerbaijan have flourished. They are the strongest they have been since the Soviet collapse. In August 2024, Putin made a state visit to Azerbaijan accompanied by senior ministers, including economic officials. Unlike the West, Russia never criticizes Azerbaijan's authoritarian domestic system or its violations of human rights. The relationship is transactional, and Azerbaijan remains neutral and has not joined the Eurasian Economic Union or the BRICS.

In sum, Russia faces a strategic dilemma in the South Caucasus as it relates to the Black Sea and the war in Ukraine. Russia needs to cooperate with all three states to maintain trade flows and help evade sanctions. But the lack of capacity and the need to refurbish its Black Sea fleet complicate Russia's ability to project power in the region. For the time being, Russia will have to work hard to compete with other powers who are becoming increasingly active in the South Caucasus.

The Middle East

Russian influence in the Black Sea has long facilitated Russian ambitions in the Middle East. Since the Russian occupation of Crimea in 2014, and especially since the Russian invasion of Ukraine in February 2022, the reverse has also been true: good relations between Moscow and the Middle East have facilitated Russia's aims vis-a-vis Ukraine and the Black Sea region.[137]

Russia's strengthened military presence in Crimea starting in 2014 greatly facilitated its 2015 military operation in Syria, which allowed Bashar al-Assad to maintain power for an additional ten years. Crimea served as the launch point for the so-called "Syrian Express" logistics

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operation, which provided supplies initially for the Syrian military and subsequently for Russian forces stationed in Syria.[138] Russia used its position in Syria during the peak of the civil war to accelerate migration flows from Syria into Türkiye and Europe, straining host society capacities and generating discontent in European societies about the arrival of migrants from the Middle East.[139]

As we discuss in more detail later, the establishment and expansion of Russian military bases in Syria in turn allowed Russia to expand its naval and air operations in the Mediterranean and to begin a major influence operation in Africa, with the Syrian bases serving as key logistics nodes for both efforts.[140]

After its February 2022 assault on Ukraine, Moscow's position was enhanced by the relations it had built in the Middle East. Every government in the Middle East refused to join the West's Ukraine-related economic sanctions against Russia. Middle Eastern countries saw Russian-Western differences over Ukraine as an opportunity to benefit economically by helping Russia evade sanctions and by redirecting Russian trade away from the West.[141] As a consequence, Russia has gained both money and materiel needed for its war effort.[142] Saudi Arabia joined with Russia via the OPEC+ format to reduce oil production in support of higher oil prices.[143] Russia uses the United Arab Emirates (UAE) as a hub through which to acquire Western goods that the West no longer sells directly to Russia.[144]

Moscow has benefited from pervasive sentiment in Arab countries that the West is more concerned about Ukrainians under Russian attack than about Palestinians under Israeli attack, Arabs under attack from Iran and its proxies, and Arabs engulfed in civil war as in both Yemen and Sudan.[145]

Moreover, even though Israeli public opinion is more sympathetic toward Ukraine and critical of Russia, Israel's need to preserve the Israeli-Russian deconfliction agreement regarding Syria (wherein Russian forces did not interfere with Israeli attacks against Iranian and Hezbollah targets in Syria) and concerns about Russia's Jewish community have limited Israeli support for Ukraine.[146]

These initial advantages have been tempered by several Middle East complications arising from Russia's aggression against Ukraine. First, the war diverted Russian personnel and weaponry from Syria to Ukraine.[147] Second, Türkiye's closure of the Turkish Straits limited Moscow's naval access to the Mediterranean, which made it more difficult for Moscow to supply its Tartus naval base in Syria even as the base became more important for Russia's navy.[148]

Third, Russia-Middle East arms trade also became more complicated. The war constrained Russia's ability to sell arms to Middle Eastern governments, and the U.S. and Europe had relative success pressuring those governments not to sell arms to or buy arms from Russia.[149]

Finally, the invasion disrupted Ukrainian and Russian exports of wheat and other foodstuffs to highly-dependent, food-insecure Middle East countries. Moscow may have agreed to the Black Sea Grain Initiative in part because its Middle Eastern partners expressed fears that their region could become destabilized by inadequate food supplies and high grain prices. The Initiative briefly helped to mitigate those insecurities, but prices are volatile and uncertainty continues even as Ukraine and Russia have each resumed food exports to the region. Moscow is

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encroaching upon Ukraine's traditional Middle East markets, including by selling grain harvested from Russian-occupied regions of Ukraine to countries such as Egypt. Ultimately, however, it has been unable to supplant Ukraine as a major food supporter to the region.[150]

Since October 2023, Moscow's Black Sea goals have been further complicated by three Middle East shocks: conflict between Israel and Hamas, conflict between Israel on the one hand and both Hezbollah and Iran on the other, and the downfall of the Assad regime in Syria.[151] Moreover, Iran's emergence as a supplier of arms to Israel's enemies and to Moscow in its war against Ukraine underscores the intertwined nature of Moscow's Black Sea and Middle East choices.

The first shock was the Israeli-Hamas conflict that began October 7, 2023 with Hamas's raid into Israel, followed by Israeli military action against Hamas in Gaza. Moscow immediately blamed the conflict on the United States, and supported and rekindled relations with Hamas.[152] Putin made antisemitic comments he hadn't before, and he backed away from his close relationship with Israeli President Benjamin Netanyahu.[153]

Russia's motivations were various. An anti-Semitic pogrom in Dagestan that same month stunned the Kremlin; high-level public statements embracing Hamas and repudiating Israel were likely related to the regime's interest in placating Russia's sizable Muslim population and heading off inter-ethnic and religious violence at home.[154] Moscow seized the opportunity offered by Israel's offensive to conflate the Palestinian fight against Israel with its war in Ukraine -- a tactic designed to gain support for Moscow among many developing countries.[155] And for a time, Russia benefited from global attention to the Israel-Hamas conflict crowding out attention to its war against Ukraine.

Despite these activities, Russia still allowed Israeli war planes to fly through Syrian air space to attack Iranian and Hezbollah positions in that country, and continued Russian Jewish emigration to Israel. Some commentators attributed this in part to Russia's interest in maintaining high-tech trade relations with Israel and to preempt Israeli support for Assad's enemies.[156] For its part, Jerusalem remained hesitant to support Ukraine.

The second shock was the escalation of conflict between Israel and Hezbollah as well as between Israel and Iran. Iran and Hezbollah were important partners for Moscow in supporting the Assad regime in Syria, and Iran has supplied armed drones and ballistic missiles to Russia for use against Ukraine.[157] Israeli moves to weaken Hezbollah and Iran undermined the ability of both to defend Assad, while Russia's preoccupation with Ukraine limited Moscow's ability to help Iran and Hezbollah counter Israel.[158] Renewed conflict between Israel and Iran further soured Moscow's relations with Jerusalem while highlighting its deepening security relationship with Tehran, both in the Middle East and on the battlefield in Ukraine.[159]

The third shock was the overthrow of the Assad regime in Syria in December 2024 by Turkish-backed Sunni Arab opposition forces, some of whom had been trained and equipped by Ukraine.[160] Ukrainian forces deployed to Idlib through Türkiye to train Syrian opposition forces, and in September 2024 even launched a direct attack on a Russian military facility outside Aleppo.[161] These activities were part of a broader effort by Ukrainian forces to target Russian forces abroad, including in Africa.[162]

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Since the collapse of the Assad regime, Russia has been vying with Ukraine, Türkiye and other countries to reestablish ties and influence in Syria. Moscow, particularly keen to hold onto its military bases, quickly delivered $23 million to Syria's cash-starved economy. Moscow also hopes to blunt Ukrainian and Turkish influence in the country. Ukraine quickly dispatched ships full of grain to Syria in December 2024 and announced it was ready to reestablish diplomatic relations. Meanwhile, Türkiye began supplying military assistance to Syria and had plans to take over several key military bases until Israeli forces severely damaged them in April 2024. Initial discussions between Russian and Syrian authorities about the Russian-operated bases have expanded to a wider agenda including potential infrastructure and energy projects, but also difficult Syrian demands on Moscow, such as the return of Assad and his other associates to Syria for trial, Russian compensation for the suffering and destruction wrought by Russian forces in the civil war, and repatriation of as much as $300 million in funds that were transferred by the former regime to Russia.[163]

The Mediterranean

The Black Sea has traditionally played a key role in Russia's ability to project power and exert influence in the Mediterranean, and in using its Mediterranean presence to boost Russia's status, protect Russian approaches, reduce Russia's vulnerability to surprise, influence vital commercial and energy streams, and conduct operations across Africa. Linkages between the two were enhanced via three operations over the past decade: Russia's 2014 annexation of Crimea; its 2015 intervention in Syria; and its 2017 expansion of activities from Syria and Libya into Africa. Russia's gains were cumulative, with initial success in the Black Sea allowing for expanded ambitions in Syria and subsequently across the Mediterranean and North Africa.[164]

During the Cold War, most ships in the Soviet Union's 5th Operational Squadron in the Mediterranean came from the Black Sea Fleet. The Russian Navy reestablished the Mediterranean Squadron in 2013, drawing on ships from various fleets deploying to the region on a rotational basis.[165] Its ability to supply ships from the Black Sea was limited by Ukraine's ability to influence ship stationing at Russia's Sevastopol navy base.[166] Russia's annexation and subsequent militarization of Crimea in 2014 enabled it to modernize the Black Sea Fleet and assign some of its surface ships and submarines to the Mediterranean Squadron.

The Mediterranean naval squadron was established in part to act as a forward defense for southwestern Russia. Russian planners believed that the creation of a southern bastion in the Mediterranean would make it more difficult for NATO and other forces to gain access to Ukraine and several other countries in Russia's neighborhood. By 2022, the squadron developed into a robust permanent naval force in the region. A longstanding Russian naval logistics facility at Tartus, Syria was expanded into a full-fledged naval base. At its peak, the Mediterranean squadron generally included two modern diesel electric submarines, one or two nuclear powered submarines, 3-5 large combatant surface ships, and several smaller combat ships and auxiliaries. The squadron has regularly conducted exercises and operations throughout the Mediterranean, including with foreign navies such as China's. One of the main strategic goals of the squadron's deployment has been to establish credible maritime conventional deterrence versus NATO through the combination of air defenses and cruise missile–equipped ships, which work together

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to signal that any use of NATO naval forces against Russian ships and facilities would be highly costly.[167]

Russia's strengthened military presence in Crimea was a necessary condition for its 2015 intervention in Syria. The establishment and expansion of Russian military bases in Syria in turn allowed Russia to expand its naval operations in the Mediterranean and to launch major influence operations in Africa, with the Syrian bases serving as key logistics nodes for both efforts. Black Sea-Mediterranean connections via Syria have also been important to the Russian air force. Planes transporting supplies and personnel from Russia's Black Sea airbases to African countries used the Russan-operated Khmeimim air base in Syria as a key transit and refueling point.[168] Russia's position in Syria enabled it to turn Libya into a logistics hub for operations by the Russian military and the Wagner mercenary group in Sudan, Chad, Niger and elsewhere in the Sahel and Central Africa.[169] Russia has also used its relationship with Libyan warlord Khalifa Haftar to skirt Ukraine-related oil sanctions. Between 2022 and 2024 Russian oil sales to several destinations via Libya amounted to an estimated $5 billion.[170]

Following Russia's 2022 invasion of Ukraine, Russia suffered three cumulative setbacks related to its Black Sea-Mediterranean goals. The first came shortly after the war began, when Türkiye closed the Turkish Straits. This action effectively severed Russia's ability to use the Black Sea as a rear base from which to project power to the Mediterranean.[171] The second setback came over the ensuing year, when Ukraine inflicted significant losses on Russia's Black Sea naval forces.

The third setback was the loss of Syria at the end of 2024. As discussed earlier, it remains to be seen whether Russia will be able to stabilize the situation, potentially by making an agreement with the new Syrian government to retain at least partial access to its bases, or if turmoil in Syria weakens Russia's ability to continue its military and security assistance operations across the Mediterranean and into Africa.[172] Russia's outpost in Libya is unable to compensate for the loss of Russia's Syrian bases, since airfields in Libya are too distant for Russian transport aircraft to reach without a refueling stop or a direct route over countries that to date have not allowed Russian military aircraft to transit their airspace. Russia's port access arrangements in Algeria suffer from similar limitations.[173] The lack of alternatives will potentially make Russian dependent on Türkiye for overflight permission or, potentially, to have to make significant concessions to Syria to retain at least some base access, particularly to Khmeimim and Tartus.[174] Tartus, for example, is the only Russian facility in the Mediterranean capable of sustaining Russia's diesel-electric powered submarines. Without Tartus, Russian submarine activity in the Mediterranean would have to draw on resources elsewhere.[175]

Conclusion

Russia's effort to become the dominant power in the Black Sea is a tale of uneven successes and notable setbacks. Moscow's military interventions in Georgia in 2008 and in Ukraine in 2014 and 2022 have prompted its Black Sea neighbors to minimize their dependencies on Russia, hedge their bets on future developments, and diversify partnerships with other countries as possible. The war against Ukraine continues unresolved, draining Russian resources, preoccupying elite attention, and literally sinking Russia's Black Sea naval ambitions. The rift between the two countries is unlikely to be bridged for generations. Türkiye's complex cooperative-competitive relationship with Russia is also central to intra-regional dynamics. It has

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positioned Ankara as the biggest obstacle to Moscow's ability to dominate the Black Sea, even as the two countries engage in mutually beneficial transactions. NATO members Romania and Bulgaria have each distanced themselves from their previously close ties with Russia, although each country's politics continues to be volatile, with Moscow able to take advantage of popular frustration with each country's elites, who have largely failed to deliver on promises to improve their societies. Domestic discontent in Moldova and Georgia offers additional fertile ground for Russian tactics of influence, corruption, subversion, and disruption, which are amplified in each case by Russia's military presence in breakaway regions in each country.

Russia has also had mixed results from its efforts to capitalize on the Black Sea's role as a crossroads for key flows of energy, people, food and other commodities, and as a platform from which to project power and influence to neighboring areas. It has gained grain markets at Ukraine's expense, but has also generated greater food insecurity for millions and tensions with scores of recipient countries around the world. Its weaponization of people flows meets the definition of war crimes. Its efforts to use energy as an instrument of influence has spurred Black Sea countries to seek non-Russian alternatives. To evade international sanctions, it has had to develop elaborate and inefficient trading and shipping schemes across the region and beyond. While Russia remains a significant player in the South Caucasus, it has lost its role as regional hegemon. Its war against Ukraine has similarly diminished its influence in the Middle East and the Mediterranean. Its naval failures in the Black Sea, and Ankara's closure of the Turkish Straits, has removed the Black Sea's role as a springboard for Russian activities in these adjoining regions. Given its strained capabilities, Moscow was forced to choose its war in Ukraine over its ongoing support for Syrian dictator Bashar al-Assad, and is now scrambling to regain some degree of influence with the country's new leadership. The loss of its bases in Syria, in turn, has complicated its efforts across the Mediterranean and into Africa.

Russia's quest to become the dominant power in the Black Sea predates its 2022 invasion of Ukraine and the ongoing war has complicated its ability to achieve its maximal goals. When the war ends, Moscow may well reassess how it interacts with the other littoral states. A Russian victory could render its Black Sea neighbors more vulnerable to Kremlin pressure and could change regional dynamics in unforeseen ways. In the absence of any certainty about the outcome of the war, it behooves the other Black Sea states to strengthen their resilience against Russian pressure—and for the West to support them consistently in these efforts.

Notes

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