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ENERGY TURKEY RELATIONS  
CONFLICTS NATO BULGARIA  
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COOPERATION

## BLACK SEA

STRATEGIES WARGAMING  
CRIMEA SECURITY ROMANIA REGION POLICY  
USA GEORGIA RUSSIA

- BLACK SEA SECURITY
- REGIONAL POLICIES
- COOPERATION VS CONFRONTATION



## The Black Sea

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# ENERGY CRACKS OF THE BLACK SEA SECURITY

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*The energy picture of the Black Sea region is being changed with new energy infrastructure and ongoing attempts of the Russian Federation to enhance its energy influence on other countries. The article focuses on analysing these transformations, their consequences, the current energy problems, and possible threats produced by Russia using energy facilities for military purposes. The authors propose recommendations to counter Russia's energy expansion and balance its dominance in the Black Sea region.*

While militarising the Black Sea region, the Russian Federation continues its policy of energy expansion in the region. This has intensified after Russia started to wage war against Ukraine, which began with Russia's occupation of Crimea. In some cases, the Russian Federation physically captures the energy infrastructure of another country, and in other cases, new gas transportation infrastructure is being built, destined both to strengthen the energy levers of the Russian Federation's influence on some countries of the region (Ukraine, Turkey, Bulgaria, and Serbia) and to be used for military purposes. First of all, this concerns the supply of natural gas, as diversification of routes and sources of gas supplies is a complex and expensive process.

## **Transformation of Energy Supplies in the Black Sea Region**

The idea of constructing new gas pipelines through the Black Sea region did not die after the fiasco of two grand projects to

build new routes for gas supplies to the EU – the European project of the Nabucco pipeline (2013) and the Russian project of the South Stream (2014). Russia continued to look for opportunities to stop gas transit through the Ukrainian gas transmission system (GTS) by constructing bypass routes transporting Russian gas to Turkey and countries of Southeastern Europe. In its turn, Azerbaijan made efforts to build a direct route of transportation of its own gas produced at Shah Deniz 2. As a result, the TANAP (Trans-Anatolian Gas Pipeline) project was launched in 2011 and the TurkStream project started in 2015. In addition, several projects to build gas interconnectors between the countries of the region – Romania and Moldova, Bulgaria and Greece, Turkey and Bulgaria, Bulgaria and Serbia, etc. – are underway. At the same time, no LNG terminals are being built on the Black Sea coast.

The TANAP gas pipeline, able to supply up to 16 bcm a year, was successfully built from the Georgian-Turkish border to the Turkish-

Greek border, where it was connected to the Trans-Adriatic Pipeline (TAP)<sup>1</sup>. After the completion of the TAP project, Azeri natural gas should enter the EU market in 2020. Turkey, Bulgaria, Greece, Italy, Albania, and North Macedonia rely on gas from Shah Deniz 2. In the future, the TANAP Consortium plans to increase the capacity of the pipeline to up to 24 bcm<sup>2</sup>. Unlike TurkStream, this pipeline is a real diversification of gas supply routes and also sources of gas production. This, on the one hand, does not reduce the volume of Russian gas transported through Ukrainian territory, but on the other hand, allows European consumers to reduce volumes of their gas import.

In its essence, the TurkStream gas pipeline is a cut-off version of the South Stream project, with the only difference that it goes not to the Bulgarian coast but to the Turkish one, which allows it to avoid the rules of the EU's Third Energy Package, which "killed" the South Stream project at that time. Following this logic, Russia reached an agreement with Turkey, according to which the first line of TurkStream to carry 15.75 bcm of gas was completed at the beginning of January 2020 and should supply gas to the Turkish market. However, due to a 40% drop in total Russian gas imports by Turkey (up to 14.5 bcm) in 2019<sup>3</sup>, since January 1, 2020, Russia decided to start using this first line for supplying gas to Bulgaria, Greece, and North Macedonia, which practically stopped the transit of the corresponding volumes of gas through Ukraine, Moldova, and Romania by the Trans-Balkan Pipeline. This direction of the Ukrainian GTS is currently used only to supply Russian gas to Moldova and Romania.

The second line of TurkStream, with the same capacity of 15.75 bcm, is under construction on land and should bring gas through the Balkan Stream pipeline to Bulgaria and further to Serbia, Hungary, and Austria. Gazprom plans to complete this branch by the end of 2020. The Serbian part of the Balkan Stream has already been physically built, but the Bulgarian part has just started. In case of completion of this route, as well as completion of Nord Stream 2 through the Baltic Sea, the transport of Russian gas for the needs of Serbia, Hungary, and partly Austria through the Ukrainian GTS will be stopped. Therefore, the question is how long OGTSU, which is now a separate operator of the Ukrainian GTS after the EU-led unbundling process, will be able to keep the GTS operational without receiving necessary funds for transportation services. The second question is what the European consumers will do if Russia stops supplying gas through its "streams".

In addition to the gas flow from Azerbaijan, which Russia is trying to use for demonstration of so-called diversification of gas supplies through the Balkan Stream, other projects are being worked out outside Russia's influence. First of all, it is necessary to pay attention to Romania, which plans to increase gas production on the Black Sea shelf. The project, called Neptun Deep, is being implemented by OMV and ExxonMobil. The new gas field, with confirmed gas reserves of up to 84 bcm<sup>4</sup>, should fully meet Romania's needs and allow it to export certain volumes of gas to other countries, including Hungary. However, at the end of 2018, the Romanian

1 *Trans-Anatolian Natural Gas Pipeline Project*, TANAP Official Information, 2018  
[[https://www.tanap.com/content/file/TANAP\\_WEB\\_201812.pdf](https://www.tanap.com/content/file/TANAP_WEB_201812.pdf)].

2 Ibid

3 M. Nechyporenko, *Turkey Halves Consumption of Russian Gas*, "The Page", 5 February 2020  
[<https://thepage.ua/ua/news/turechchina-skorotila-spozhyvannya-rosijskogo-gazu-majzhe-v-dva-razi>].

4 *Neptun Deep Gas Field Project, Black Sea*, "Offshore Technology", 2019  
[<https://www.offshore-technology.com/projects/neptun-deep-gas-field-project-black-sea/>].

parliament approved a new law requiring companies to sell at least half of the produced gas in the Romanian market and reducing from 60% to 30% the amount of investments in gas production that is subject to tax benefits. As a result, the mentioned companies declared that the law threatened their investment decisions to support offshore gas projects in Romania. In December 2019, ExxonMobil decided to sell its stake in Neptun Deep and submitted proposals to the state-owned company of Romgaz and other energy companies<sup>5</sup>. In the state of uncertainty, Romania continues to import gas from Russia, which is about 1 bcm annually<sup>6</sup>, through the Ukrainian GTS under the current contract with Gazpromexport.

Meanwhile Bulgaria is implementing the Balkan Gas Hub project, a gas-trading centre in Turkey, which receives gas through pipelines from Russia, Azerbaijan, and Iran, and liquefied gas from a number of countries (Algeria, Nigeria, USA, and Qatar)<sup>7</sup>. According to the Turkish Energy Market Regulatory Authority (EPDK)<sup>8</sup>, Turkey imported 50.36 bcm of natural gas in 2018, which was 8.85% less than in 2017, and 45.21 bcm in 2019, which was 10.2% less than the previous year.

The situation changed dramatically in 2019. In 2018, the share of gas import from the Russian Federation to Turkey

was 46.95%, the share of LNG – 22.49% (supplied from spot market and under long-term BOTAS contracts with Algeria and Nigeria). In 2019, Russia's share was only 34%, but the LNG import increased to 28.3%, while imports from Azerbaijan increased to 21% and those from Iran – to 17%.<sup>9</sup> Turkey has become the second largest importer of LNG in Europe, after Spain. In particular, it increased LNG imports from the US. The changes are largely due to the recent expansion of the LNG terminals capacity in Aliaga on the Aegean Sea and Marmara Island in the Sea of Marmara<sup>10</sup>.



***Among all the countries in the western part of the Black Sea region, Bulgaria is in the worst condition because it lacks its own gas storage facilities and remains dependent on one source – Russia***

While having its LNG terminal in Revithoussa, Greece plans to deploy a new mobile terminal (Floating Storage Regasification Unit, FSRU) near *Alexandroupolis* to receive liquefied gas from the United States, and counts on gas from the new EastMed pipeline, which will supply up to 10 bcm of gas from the Eastern Mediterranean.<sup>11</sup>

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- 5 ExxonMobil to Exit from Neptun Deep Project, "Energy Industry Review", 13 January 2020 [<https://energyindustryreview.com/oil-gas/exxonmobil-to-exit-from-neptun-deep-project/>].
  - 6 Dynamics of Gas Sales to Europe, Gazprom Export, 2019 [<http://www.gazpromexport.ru/statistics/>].
  - 7 Turkey Reduces Gas Import from Russia to Benefit LNG Supplies from the U.S., "Kosatka Media", 3 September 2019 [<https://kosatka.media/uk/category/gaz/news/turciya-sokrashchaet-import-gaza-iz-rf-v-polzu-postavok-ing-iz-ssha>].
  - 8 Report: Turkish Natural Gas Market, EPDK, 2019 [<https://www.epdk.org.tr/Detay/Icerik/3-0-95/dogal-gazaylik-sektor-raporu>].
  - 9 Ibid
  - 10 A. Sabadus, Rare Opportunity Opens for US LNG to Reach Greece-Turkey-Ukraine Gas Corridor, "Atlantic Council", 22 August 2019 [<https://www.atlanticcouncil.org/blogs/energysource/rare-opportunity-opens-for-us-lng-to-reach-greece-turkey-ukraine-gas-corridor/>].
  - 11 P. Tugwell, Leaders from Israel, Cyprus, Greece Sign EastMed Gas Pipe Deal, "Bloomberg", 2 January 2020 [<https://www.bloomberg.com/news/articles/2020-01-02/leaders-from-israel-to-greece-set-to-sign-eastmed-gas-pipe-deal>].

Among all the countries in the western part of the Black Sea region, Bulgaria is in the worst condition because it lacks its own gas storage facilities and remains dependent on one source – Russia, which has supplied it with gas through TurkStream to bypass Ukraine since January 1, 2020. This has not improved energy security of Bulgaria. Furthermore, Sofia also counts on the US gas to be supplied through the above-mentioned mobile LNG terminal near Alexandroupolis and the IGB gas interconnector to the Bulgarian GTS<sup>12</sup>.

It is worthwhile to look at projects of diversification of gas sources in the Black Sea region, which are under way due to construction of the new US-supported LNG terminals, including those within the Three Seas Initiative. In particular, speaking at the 2020 Munich Security Conference, US Secretary of State Michael Pompeo declared an intention to “provide up to 1 billion USD in financing to Central and Eastern European countries of the Three Seas Initiative” to support energy projects<sup>13</sup>. They include increasing capacity of the LNG terminal in Swinoujscie (Poland) and installation of FSRU on Krk Island (Croatia) with appropriate gas transport infrastructure. In addition, the US plans to support the construction of a new LNG terminal near Alexandroupolis, which should receive American gas. Turkey also does not stop and plans to increase its capacity of receiving LNG.

All these planned, completed, and ongoing projects demonstrate a significant change in the map of gas supply and distribution

in the Black Sea region. The changes are aimed at diversifying sources of gas imports and avoiding dependency on one supplier, which enhances security of supply and reduces Russian gas dominance. However, the mentioned Russian projects increase gas dependence of several countries (Bulgaria and Serbia) on the Russian Federation and damage the existing gas transport infrastructure, which is de facto an integral part of the EU gas network.

### **Energy Problems and Related Threats**

Occupied Ukrainian Crimea, its gas infrastructure, and projects initiated by Russia to build new gas pipelines in the Black Sea region pose security and economic threats not only to Ukraine but also to the EU gas market, undermining its principles of solidarity, competitiveness, and energy security. These projects pose an additional threat to the Black Sea security.

After the occupation of Crimea, Russia captured Ukrainian assets in the Black Sea – extraction platforms and drilling rigs of the Ukrainian state-owned company Chornomornaftogaz (a subsidiary of Naftogaz of Ukraine), which supplied gas directly to the peninsula. The platforms, where the Russian military is permanently present, have become proper sites for installation of means of maritime and airspace control, as well as radio-intelligence services for the Black Sea Fleet with the use of civilian maritime infrastructure capabilities in the northwestern part of the Black Sea<sup>14</sup>.

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12 S. Todorov, *Bulgaria Buys Share of Greek Gas Terminal*, “BalkanInsight”, 10 January 2020 [<https://balkaninsight.com/10-January-2020/bulgaria-takes-role-in-greek-gas-terminal/>].

13 M. Pompeo, *The West Is Winning*, Speech at the Munich Security Conference, State Department, 15 February 2020 [<https://www.state.gov/the-west-is-winning/>].

14 *Offshore Gas Infrastructure in the Russian Counteraction to NATO on the East Flank: Potential for a Hybrid Use in the Black and Baltic Seas*, Centre for Global Studies “Strategy XXI”, October 2018 [[https://geostrategy.org.ua/images/NSTS\\_HybridTechWar.pdf](https://geostrategy.org.ua/images/NSTS_HybridTechWar.pdf)].

A comprehensive system of monitoring surface and underwater environment, aimed at detection of surface, underwater, and low-flying air targets, was deployed at artificial structures of the so-called State Unitary Enterprise of the Crimean Republic 'Chernomorneftegaz' (hereinafter SUE ChNG)<sup>15</sup>. Such artificial structures in gas and gas-condensate fields (GF and GCF) in the Ukrainian sector of the Black Sea are the captured fixed offshore platforms (FOPs), jack-up drilling rigs (JDR), wellhead platforms (WP), and central processing platforms (CPPs).

A surveillance system for surface environment – the NEVA-BS centimetre-wave radar<sup>16</sup> – was deployed on TAVRIDA jack-up drilling rig, FOP-17 (MCII-17) on Shtormove gas-condensate field, and FOP-4 (MCII-4) on Holitsynske gas-condensate field in three sets<sup>17</sup>. The NEVA-BS radar provides automated detection and tracking of up to 200 targets simultaneously with the range from 8 miles (15 km) to 30 sea miles (55.5 kilometres). In addition, the NEVA-B millimetre-wave radar and imagery system set were installed on JDR TAVRIDA. The mentioned radar has the range of target detection from 0.5 miles (~1 km) to 24.3 miles (45 km).

The real-time data are transmitted to the Border Service of the Federal Security Service (FSB) of the Russian Federation in Crimea and passes to the intelligence chain of the Black Sea Fleet of the Southern Military District of the RF. Thus, deployment

of surface surveillance systems on the Chornomornaftogaz's objects, captured in the exclusive maritime economic zone of Ukraine, provides Russia with almost complete control over the traffic of commercial ships and warships that head to the ports of Ukraine and in the opposite direction in the northwestern part of the Black Sea.

In addition to installation of radars for surface surveillance, the sonar system for underwater environment surveillance was installed on the following SUE ChNG objects<sup>18</sup>:

- FOP-4 (MCII-4) on Holitsynske GCF, located 61 km to the northwest from the Crimean Cape Tarkhankut;
- FOP-17 (MCII-17) Shtormove GCF, located 72 km to the west from Cape Tarkhankut;
- WP-2 (БК-2) on Odeske GCF, located 66 km to the northeast from Snake Island.

Cooperation between the FSB RF in Crimea and the Russian Black Sea Fleet has been established within the framework of information exchange on surface and in the underwater environment in the northwestern part of the Black Sea, with the use of technical capabilities of SUE ChNG. All these allow the leadership of the Coastal Guard of the FSB RF in Crimea and the Command of the Black Sea Fleet to accomplish the following tasks in real time<sup>19</sup>:

15 Ibid

16 *NEVA-B Is a Coastal Millimeter-wave Radar*, TETIS Integrated Systems Ltd. [<http://www.tetis-ks.ru/catalog/256/1400>].

17 *Notice to Mariners No. 1402-1541*, C-П6. (9956.12), 19 March 2016, pp. 15-17; *Notice to Mariners No. 2105-2258*, C-П6. (9956.17), 23 April 2016, p. 19; *Notice to Mariners No. 3924-4074*, C-П6. (9956.30), 23 July 2016, pp. 18-19. *Notice to Mariners No. 6878-7005*, C-П6. (9956.51), 17 December 2016, pp. 18-19.

18 Ibid

19 A. Ramm, *Russia Deploys a Global System of the Naval Surveillance*, "Izvestia", 25 November 2016 [<https://iz.ru/news/647107>].

- comprehensive monitoring of the surface and air space on the Cape Tarkhankut-Snake Island line (up to 170 km);
- control over international navigation;
- reconnaissance support of operational decisions to conduct warfare under supreme military command.

Russia permanently monitors international navigation and operations of naval vessels of other countries in the northwestern part of the Black Sea and provides critical information to the Russian Black Sea Fleet to hold navy operations in case of combat missions.

Maritime gas transport infrastructure, first of all TurkStream, fulfils a geopolitical function for Russia to establish its military-political domination under the guise of protecting economic interests from foreign encroachments. Therefore, the issues of ensuring the security of marine gas transportation systems, including countering possible sabotage, will automatically lead to their military affiliations under the pretext of a threat from NATO. All this serves as the basis for defining security zones, as a guarantee of uninterrupted exploitation of the objects of the marine gas transportation infrastructure, aimed at further deployment of dual-purpose security systems, including simultaneous activities of acoustic intelligence.

Prospective tools for acoustic intelligence can be artificial intelligence mini submarines of Russian production, which are capable to submerge to depths as low as 300 metres and operate without human intervention for up to three months, providing from an underwater position a “vision” of the movement of underwater and surface objects that depends on their size, noise level, and

type of hydrology at a distance that can reach tens of kilometres<sup>20</sup>. Such an apparatus may be installed in the corridor of the TurkStream gas pipeline, where it extends to the appropriate depths. Passive hydroacoustic reconnaissance stations that emit nothing but listen to the sea space from under the water – for example, robotic autonomous bottom stations (UDF) of the Harmony system, which has been developed by the Russian Ministry of Defense since 2016 – may also be installed. Russian civilian vessels designed to survey or service TurkStream can conceal such stations at sea bottom, creating a network of underwater and surface controls on the routes of warships from the Bosphorus to the Black Sea ports in an area of hundreds of square kilometres.

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 ***Maritime gas transport infrastructure, first of all TurkStream, fulfils a geopolitical function for Russia to establish its military-political domination under the guise of protecting economic interests from foreign encroachments***

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First of all, the targets of permanent control are the naval ships of Ukraine and NATO member states, in particular those from the NATO Naval Group, as well as those that participate in international exercises in the Black Sea region.

Russia has begun to use another tactic to strengthen its control over the Black Sea, which is to restrict the freedom of navigation attached to its energy projects. For example, in July–August 2019, starting with the US–Ukraine 2019 Sea Breeze exercise, Russia

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<sup>20</sup> Ibid

closed five areas in the Black Sea, including the exclusive maritime economic zone of Ukraine, Bulgaria, and Romania.<sup>21</sup> It also closed the eastern part of the Black Sea from Sochi to Turkey precisely during the period of the Georgian–American 2019 Agile Spirit exercises. However, in some of these areas, training or shooting were not conducted.

When you overlay a map of the denied-access areas, shut off by Russia, on the map of routes of the underwater gas pipelines Blue Stream and TurkStream, to a large extent, they coincide.

All this means that, under the guise of ensuring the security of gas infrastructure and uninterrupted supply of Russian gas to European consumers, Russia is preparing to transform the Black Sea on D-Day into a zone of its own total control. In addition, it seeks to impose on the Black Sea, the EU, and NATO countries a perception that the entire Black Sea is an area of Russian influence. Further actions of the Russian Federation will be aimed at continuing the occupation of Ukraine's exclusive maritime economic zone, displacing NATO from the Black Sea, and transforming the sea into a Russian restricted area.

### **Are There Any Options to Counteract This?**

Despite the aggressiveness, arrogance, and “creativity” of Russia's actions in the Black Sea region, it is possible and important to create effective levers to counteract and curb Russia's creeping occupation of the Black Sea. This requires consolidation of the efforts of all Black Sea countries as well as their allies and partners in the EU and NATO.

First of all, it is necessary to stop the policy of appeasement of the Russian Federation,

which is considered by the Kremlin as a permit for further aggression. All countries and international organisations should clearly define the responsibility of the Russian Federation for violation of international law and take all possible measures to punish it and return to the legal field, which requires establishing systems of international monitoring of the situation in the region.



***Successful implementation of projects to diversify routes and, most importantly, sources of gas supply to the countries of Southeastern Europe counterbalances Russia's ability to use energy as a hybrid weapon***

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Russia should be stopped in all regions – the Black Sea region, the Baltic region, the Mediterranean. The US sanctions against North Stream 2 and TurkStream contractors have already yielded positive results – offshore pipelines have been suspended and Russia has become more compliant during the gas talks with Ukraine and other countries-consumers of Russian gas. These sanctions should be backed by the EU and NATO member states, and the Black Sea countries should refrain from implementing joint infrastructure projects with the Russian Federation; this would only increase energy security and prevent a negative scenario of transforming the Black Sea into a Russian-dominated area.

Successful implementation of projects to diversify routes and, most importantly, sources of gas supply to the countries of Southeastern Europe counterbalances Russia's ability to use energy as a hybrid

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21 A. Klymenko, A “Russian Lake”: The Nine Aspects of the Current Situation in the Black Sea, “Black Sea News”, 4 August 2019 [https://www.blackseanews.net/en/read/153503].

weapon and strikes Russia's economy, which is dependent mainly on export of energy resources and suffering losses in conditions of competitiveness and low prices. The US policy to increase LNG export to countries of the region by building appropriate infrastructure not only will restrain Russia's energy expansion but will also be accompanied by fully justified US actions to strengthen its presence in the region, including its military component.

The US permanent presence in the Eastern Mediterranean will create a security umbrella for the Balkans. Missile systems from the northeast Aegean sector are capable of controlling the Black Sea. If the location of the US Navy is Greek Alexandroupolis, Russia will find it more difficult to block Ukrainian ports in the Black Sea and the Sea of Azov, as its maritime trade and the "Syrian express" from the Black Sea ports risk to be blocked in return.

In general, NATO should enhance its naval presence in the Black Sea region, including through the formation of a permanent naval group in the Black Sea and the creation of its command structures, the deployment of air defence/missile defence systems, strike complexes, training exercises, the establishment of its own regional A2/AD areas. It is advisable to create such a zone in the northwestern part of the Black Sea so that it protects the maritime and air space in the region of the Black Sea coast of Ukraine, Bulgaria, and Romania. It is a region with proven reserves of natural gas, the production of which is extremely undesirable for Russia.

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