

# The Changing Tides of Black Sea Power Dynamics. Freedom of Navigation and Connectivity in the Black Sea Region

## Key points:

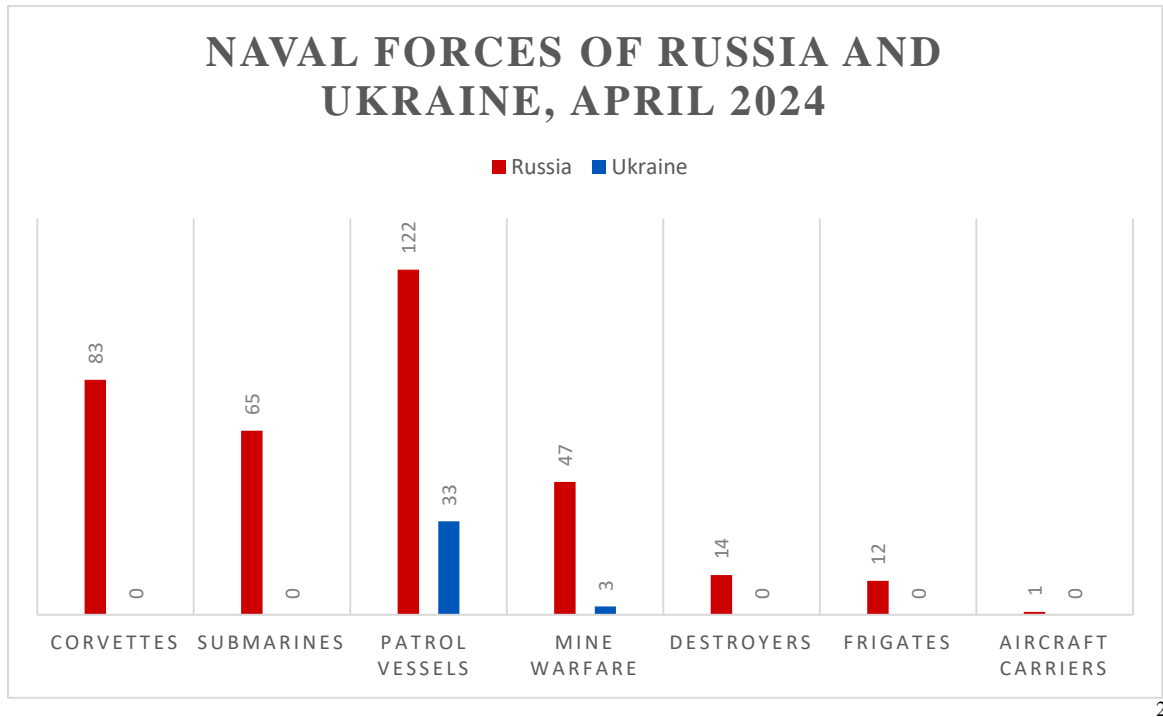
1. The Black Sea Region's geopolitical significance and power dynamics have massively changed since the start of the war in Ukraine with Turkey coming out on top;
2. The lack of a regional strategy for the Black Sea Region is detrimental to security, trade, and freedom of navigation;
3. Joint investments in energy and infrastructure could be a deterring factor in the region for future aggression.

*Ten years after the illegal annexation of Crimea and two years after the start of the war in Ukraine, the Russian ambition of establishing dominance over the Black Sea is more apparent than ever. By launching attacks on Russia's Black Sea Fleet, improvising a naval route which hugs the coasts of NATO member-states and utilizing the Danube as an alternative to the Black Sea for its shipments, Ukraine has been able to continue exporting goods to the rest of the world, something which is imperative for a war-torn economy. Despite the successes of Ukraine in resisting Russian aggression, a long-term strategy is needed in order to ensure the security and economic prosperity of the region. Despite NATO recognizing Russia as a threat to the region, the United States adopting a strategy for the region in the form of the Black Sea Security Act, and various bi- and multilateral partnerships emerging, the tension in the region still remains high within littoral states.*

Historically, the Black Sea has *de facto* been a *mare clausum* with Russia and Turkey as the most dominant forces in the region. The weakening of the Russian Black Sea Fleet and the historic role of Turkey in regards to the provisions of the 1936 Montreux Convention have led to a shift in regional power dynamics and swift calls for cooperation amongst littoral states and stakeholders. While Turkey has tried to maintain a nuanced approach in regards to Russia and the West since the start of the war in Ukraine, it has undoubtedly repelled Russian attempts of choke holding the region with acts such as closing off the Turkish straits for warships less than a week after the war started, trying to broker the renewal of the Grain Deal in 2023, establishing a coalition with Bulgaria and Romania to demine the Black Sea, amongst others. Without doubt, Turkey will remain the key actor amongst the littoral states which will continue to play an important role in the power distribution of the region for the years to come, the implementation of a common security strategy in the region, as well as a balancing factor between Russia and the West. While discourse on the topic of whether the Montreux Convention from 1936 should be revised in the medium-term future after cases such as Turkey denying two UK minehunter ships to pass through its waters in the beginning of the year has arisen lately, it is imperative for the international community not to simply scorn Turkey, but instead remain constructive. Coming up with alternative solutions, such as utilizing the Danube River as a transport route for vessels after excluding Russia from the Danube Commission<sup>1</sup>, as well as by expanding and enhancing infrastructure and defense capabilities in neighboring countries, such as Romania and Bulgaria, are approaches that would guarantee security and stability in the area. The future of power dynamics in the region mainly depends on finding the right balance between guaranteeing Turkey's national interests as remaining a leader in the region, while encouraging multilateral cooperation between littoral states.

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<sup>1</sup> Colibășanu, A. (February 2024). Freedom of Navigation in the Black Sea Area and the Strategic Significance of the Danube. New Strategy Center & Konrad-Adenauer-Stiftung.  
<https://www.kas.de/documents/278807/278856/Freedom+of+navigation+and+the+Danube+-+NSC+study.pdf/27a4c653-7f9c-faaf-fca5-6ffa3a70b4c1?version=1.0&t=1713447230909>



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Despite the vast imbalance of naval forces between Russia and Ukraine, the latter has managed to successfully deploy the so called “mosquito fleet” strategy, which was set in motion after the illegal annexation of Crimea, to inflict serious damage to Russia’s Black Sea Fleet, which led to pushing away Russian warships from the south-eastern coastline of Ukraine, and most importantly – the much important seaport of Odesa<sup>3</sup>. Failure of Russia to subdue Ukrainian naval routes has led to the replacement of its navy chief in March this year, yet Russia continues to do what it does best – launching rockets at civilian and infrastructure targets in the region of Odesa from the annexed Crimean Peninsula. The damage done by Ukrainian UAVs has allowed the country to regain control over some of its ports with its exports of goods such as grain surpassing the levels during the Grain Deal period, although freedom of navigation in the region is still obstructed. Russian naval exercises, which encroached upon Bulgaria’s EEZ, the floating mines in the Black Sea as a result of the maritime blockades, which endanger vessels, cargo, and the environment of the area, rising insurance premiums, which lead to

<sup>2</sup> Statista. (2024, April 9). Comparison of the military capabilities of NATO and Russia 2024. <https://www.statista.com/statistics/1293174/nato-russia-military-comparison/>

<sup>3</sup> Григоренко, Ю. (2024, February 15). Ukrainian sea corridor performance for half a year. GMK. <https://gmk.center/en/posts/ukrainian-sea-corridor-performance-results-for-half-a-year/>

economic disturbances, as well as a general security threat to littoral states, have underlined the need for a common strategy that is based on a regional cooperation approach.

Such approach should not be simply limited to an increase in defense spending, the establishing of new NATO bases in proximity to the Black Sea<sup>4</sup>, but also by focusing on intragovernmental projects for energy security and diversification. The Black Sea Submarine Cable Project, which aims to improve connectivity between the EU and the South Caucasus region and lower dependence on Russian fiber-optic infrastructure, as well as exploring the Black Sea's energy potential in wind, gas, and oil sources, are critical for the future of the Black Sea Region.

While Romanian lawmakers adopted a law on offshore wind energy earlier in April, with production set to start by 2032, the Bulgarian draft Bill on Energy from Renewable Sources in Maritime Spaces was not even put up to voting on second reading in the National Assembly earlier this year<sup>5</sup>. The draft law attracted criticism from activists, the political opposition, and people employed in the tourism and fishing industries, due to the act's ambiguity and lack of public discussion before its adoption. Regardless of the draft bill's fate, the potential of offshore wind energy in Bulgaria is large enough to warrant a reconsideration of the matter by the next National Assembly after the elections on June 9<sup>th</sup>. The fixed-bottom offshore wind potential of 2 GW, part of the total of 26 GW technical potential, is comparable to the output of Bulgaria's NPP "Kozloduy" – 1.966 GW net. The war in Ukraine has proven yet again that diversification in energy sources is the key to ensuring energy security and security in general, with the Black Sea remaining as a potential centerpiece of such approach.

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<sup>4</sup> Nikolov, K., & Mandilara, S. (2024, April 16). Blinken says Putin was wrong about allies in the Black Sea. [www.euractiv.com. https://www.euractiv.com/section/politics/news/blinken-says-putin-was-wrong-about-allies-in-the-black-sea](https://www.euractiv.com/section/politics/news/blinken-says-putin-was-wrong-about-allies-in-the-black-sea)

<sup>5</sup> Buljan, A. (2024, February 21). Bulgarian offshore wind bill passes first parliament reading, faces strong opposition. [Offshore Wind. https://www.offshorewind.biz/2024/02/21/bulgarian-offshore-wind-bill-passes-first-parliament-reading-faces-strong-opposition/](https://www.offshorewind.biz/2024/02/21/bulgarian-offshore-wind-bill-passes-first-parliament-reading-faces-strong-opposition/)

In conclusion, several key recommendations for the region can be laid out:

- 1. The development of a comprehensive strategy for the region by littoral states and stakeholders should take into account the historical power dynamics and their development since the annexation of Crimea. Turkey will remain a key player in the region and the link between the West and Russia, so it is imperative not to underestimate its position and interests.**
- 2. The mismatch in naval forces in the region and current legal and factual statute of the Black Sea demands a regional strategy which would allow littoral states to defend themselves from encroachment and disruption of navigation and trade.**
- 3. Investments in energy infrastructure would diversify the energy supply of littoral states and Europe, which will weaken the dependence on Russia while largely benefitting stakeholders.**
- 4. The National Assembly of Bulgaria should reassess the bill on Energy from Renewable Sources in Maritime Spaces and follow the example of Romania in unlocking the potential of the Black Sea.**

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