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The Inhospitable Sea

Toward a New U.S. Strategy for the Black Sea Region

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Lisa Aronsson

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A Report of the CSIS Europe, Russia, and Eurasia Program

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INTERNATIONAL STUDIES

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Contents

Introduction	2
Russia’s Revisionist Challenge	5
The Perspectives of Black Sea Littoral States	9
Turkey	10
Georgia	12
Romania	15
Bulgaria	17
Toward a New U.S. Black Sea Strategy	21
Conclusion	28
About the Authors	30
Endnotes	31

The Greater Black Sea Region



Introduction

The Black Sea region (BSR) has become a central fault line in the strategic competition between Russia and the West. It is also the crossroads for a security space that encompasses the South Caucasus, eastern Mediterranean, Middle East, and the Western Balkans and an important transit node between Europe and Asia.¹ Abutting North Atlantic Treaty Organization (NATO) allies Bulgaria, Romania, and Turkey, partner states Georgia and Ukraine, and an increasingly aggressive and revisionist Russia, the Black Sea remains vitally important for security and stability both in and beyond southeastern Europe. Along with the wider BSR—which also includes nearby Armenia, Azerbaijan, and Moldova—it has been deeply fragmented since the collapse of the Soviet Union. While some of the littoral states have secured NATO and European Union membership, all are to varying degrees caught in the middle of the unfolding strategic competition between Russia and the Euro-Atlantic West. And as Maximilian Hess points out, “an astonishing ten wars have taken place on or near the Black Sea littoral since the end of the Cold War, more than any other maritime space in the world”—including the ongoing Russian invasion of Ukraine.²

Even before Russia launched its full-scale invasion of Ukraine on February 24, 2022, the growth of Russian military power and political influence in and around the Black Sea posed a significant threat to regional security, including that of NATO allies and partners. Before Russia began its full-scale invasion, Moscow was seeking a “new nautical sphere of influence” by way of its upgraded Black Sea Fleet and maritime claims.³ Having failed in its initial goal of overrunning Ukraine entirely or ousting its government, Russia’s aims during the present war have included attempting to consolidate control over Ukraine’s Donbas region, seizing control of Ukraine’s coastal regions, demoralizing the rest of Ukraine, and achieving wider political and military dominance over the BSR. By mid-2022, Russia’s invasion and blockade of Ukrainian ports disrupted half of Ukraine’s exports both within the United

States and in NATO leading to sharp rises in food and energy prices in Europe and fears of famine in parts of Africa.⁴ Ukraine's anti-ship and coastal defense capabilities have exacted a toll on Russia's Black Sea Fleet: sinking the cruiser *Moskva*, the fleet's flagship; forcing the withdrawal of the fleet's submarines; and bottling up many of the remaining platforms in port. However, Russia retains the capacity to strike targets on land and impede navigation at sea, while Russian strategic ambitions in and around the Black Sea remain unchanged.

The expansion of Russian influence has implications for international security and the global economy more broadly.⁵ As Ukraine fights for its survival, Moldova, Georgia, Romania, Bulgaria, and Turkey all worry about the potential for future Russian aggression. They nevertheless maintain widely diverging perspectives on the conflict and relations with Moscow. Turkey remains committed to working with Russia despite their strategic competition in multiple regions, and Bulgaria faces significant Russian malign influence in its economy, media, and political system, as in different ways do Georgia, Romania, and Moldova. Regional NATO partners are vulnerable to Russian military aggression and remain uncertain about the extent of NATO's commitment to their security. Many also suffer from domestic weaknesses that constrain cooperation with the United States, NATO, and the European Union. The Black Sea exists, moreover, along the seams between regional and functional structures within both United States and in NATO. In part because of these cleavages, the Black Sea has rarely been a top-level priority for either. The U.S. 2022 National Defense Strategy, for instance, does not prioritize the BSR, and U.S. strategic objectives in the region remain unspecified.

The war in Ukraine is forcing the United States and NATO to devote more attention to the region, one which NATO secretary general Jens Stoltenberg recognized has "vital strategic importance" to the alliance.⁶ At an extraordinary summit in March 2022, the NATO allies agreed to reset their "longer-term deterrence and defense posture across all domains, land, sea, air, cyber and space," increase support for Ukraine, and deploy four new multinational battlegroups to the region—in Bulgaria, Hungary, Romania, and Slovakia.⁷ At the June 2022 summit, NATO adopted a new Strategic Concept, which identified Russia as the "most significant and direct threat to allies" and updated its core tasks accordingly.⁸ Deputy Secretary General Mircea Geoaană described a "broader competition between revisionist and brutal and aggressive Russia and our democratic world" around the Black Sea.⁹

In July 2022, U.S. senators Jeanne Shaheen (D-NH) and Mitt Romney (R-UT) introduced legislation in Congress calling for a more robust U.S. foreign and security policy toward the BSR. It called for more reporting on interagency efforts in the region and, within a year, a new Black Sea strategy "to increase military assistance and coordination with NATO and the EU, deepen economic ties, strengthen democracy and economic security, and enhance security assistance with Black Sea countries."¹⁰ Yet the United States cannot assume a robust NATO or EU strategy, nor can it rely on the littoral states (or other Western NATO allies) to restore the balance of power and open lines of communication in the BSR. With China seen as the United States' pacing challenge in the Indo-Pacific, an updated U.S. Black Sea strategy will be resource constrained, and its objectives will likely be defined by regional allies and partners' perspectives. Indeed, the National Defense Strategy describes alliances and partnerships as an "enduring strength for the United States . . . critical to achieving our objectives," and it commits the United States to incorporating allies and partners' "perspectives, competencies, and advantages at every state of defense planning."¹¹

With that objective in mind, the authors conducted field research in Bulgaria, Georgia, Romania, and Turkey in the spring of 2022 shortly after Russia's full-scale invasion of Ukraine began and follow-up

meetings in Washington throughout the remainder of the year. Through meetings with government officials, parliamentarians, journalists, scholars, and civil society activists, this research sought to better understand how these countries view their security interests in and around the Black Sea, including the impact of the war in Ukraine, and to determine what they would like to see from the United States and NATO going forward.

Based on these conversations and analysis of regional geopolitics in the wake of Russia's full-scale invasion, an effective U.S. strategy for the BSR should

- further strengthen the U.S. presence across the region through force deployments, weapons sales, investments, and diplomatic engagements;
- bolster NATO's eastern front while enhancing flexible and "minilateral" cooperation among allies and partners, including with Ukraine;¹²
- seek a new equilibrium with the region's most potent ally, Turkey, while reassuring other regional states worried about Turkish ambitions;
- prioritize democratic resilience among vulnerable frontline states inside and outside of NATO; and
- support and secure projects to enhance regional connectivity that bypass Russia.

Russia's Revisionist Challenge

The war in Ukraine and the violent conflicts elsewhere in the BSR have all been driven by Russia's revanchist ambition, advanced through multiple instruments of national power. The collapse of the Soviet Union ended a long period of Russian and Soviet domination of the wider BSR.¹³ While Moscow was from the beginning deeply engaged in the ethno-territorial conflicts that broke out following the Soviet Union's collapse, growing strategic competition with the West (i.e., the United States, Canada, and their European allies and partners) increasingly led Russia to regard the post-1991 era of "geopolitical pluralism" in and around the Black Sea as contrary to its interests.¹⁴ As Nikolas Gvosdev suggests, the resurgence of Russian military power in the BSR "challenges the West's default strategy in the region since the Soviet Union's collapse: the inexorable expansion of Euro-Atlantic institutions to encompass the entire Black Sea littoral and contain Russia within its then-limited northeastern coast."¹⁵ Though Moscow has justified its 2014 and 2022 invasions on the basis of internal developments in Ukraine, they are also consistent with Russia's long-standing ambitions to roll back U.S. and NATO influence in the region while consolidating what former president Dmitry Medvedev termed a sphere of "privileged interests."¹⁶

From the mid-2000s, Russia began taking advantage of the protracted conflicts around its borders to bolster its own military presence, prevent its smaller neighbors from achieving Euro-Atlantic integration, and deter outside involvement in the region.¹⁷ After Russia invaded Georgia in August 2008, it deployed more than 4,000 troops (including border guards) to the breakaway coastal region of Abkhazia, which Moscow proclaimed to be an independent state (plus another 4,000 to the breakaway region of South Ossetia/Tskhinvali on the Russo-Georgian border).¹⁸ Russia soon began upgrading the border guard facilities at the Abkhazian port of Ochamchire, which could also be used to host naval assets.¹⁹ Under the State Armaments Program to 2020, the Black Sea Fleet received six new submarines

and three new frigates, all capable of firing anti-ship cruise missiles (ASCMs) or Kalibr land-attack cruise missiles (LACMs), as well as numerous smaller craft. The deployment of Kalibr-capable platforms is a source of particular concern for NATO given their range (around 2,500 kilometers) and nuclear capabilities. In the coming years, the Black Sea Fleet is also scheduled to receive three additional frigates, six corvettes, and around a dozen small missile ships—though it is now doubtful that these plans will be fulfilled amid the war with Ukraine.²⁰

The annexation of Crimea in 2014 transformed the regional balance of power more decisively in Russia's favor. NATO halted cooperation with Russia, cooperative mechanisms such as the BLACKSEAFOR naval task force broke down, and both NATO and Russia stepped up the scale and tempo of their operations and exercises in and around the sea. With the annexation of Crimea, Moscow took over Ukraine's naval assets on the peninsula; since 2014, it has also built up new capabilities in Crimea as well as at its eastern Black Sea port of Novorossiysk.²¹ Prior to the renewal of hostilities in early 2022, Crimea reportedly hosted at least four battalions operating the advanced S-400 air defense system. Kinzhal air-launched ballistic missiles, advanced radars and medium-range air defense systems (Pantsir and Buk), Su-24 attack aircraft and Su-30 fighters, along with enhanced Bastion coastal defense systems were all deployed on the peninsula as well.²² Moscow also dramatically scaled up the presence of its ground forces in Crimea, including tanks, artillery, and combat vehicles.²³ In May 2016, Turkish president Recep Tayyip Erdoğan lamented that NATO is “absent from the Black Sea. The Black Sea has almost become a Russian lake.”²⁴

Employing smaller naval ships, coastal artillery, and aircraft, Russia has since 2014 aimed to prevent Ukraine from employing asymmetric capabilities to challenge Russian control of the Sea of Azov and the Black Sea littoral between Crimea and the Russian border.²⁵ At the same time, the Russian Black Sea Fleet employed its larger platforms (submarines, frigates, and missile ships—some normally deployed in the Caspian Sea or the Volga and Don rivers) to implement an anti-access/area denial (A2/AD) strategy against NATO forces across much of the Black Sea. Even before the outset of the 2022 war, these capabilities allowed Russia to dominate the maritime space within the Black Sea, choke off access to Ukraine's ports in the Sea of Azov, and project power through the Bosphorus and Dardanelles Straits to the eastern Mediterranean. As Gustav Gressel notes, because of the rapid post-2014 buildup, “Russia's current conventional military posture [in the Black Sea] is already far beyond a defensive one.”²⁶

The Black Sea is also instrumental to Russia's military operations in Syria and wider ambitions in the eastern Mediterranean. Prior to Turkey's decision in May 2022 to close the Bosphorus and Dardanelles Straits to warships, the Russian Black Sea Fleet provided the bulk of the capabilities for its Mediterranean Squadron, which Moscow reconstituted in 2013 for the first time since the end of the Cold War. During the conflict in Syria, Soviet-era landing ships from the Black Sea Fleet (and reflagged civilian vessels) dispatched troops and matériel from Novorossiysk through the straits to Russia's Syrian bases at Tartus and Latakia. Moscow also used ships from the Black Sea Fleet to “show the flag” in the eastern Mediterranean in an effort to deter NATO or other outside powers from intervening in Syria.²⁷ With Russia also seeking permanent bases in Libya and Sudan, the eastern Mediterranean risks becoming a contested zone between Russia and NATO as well.²⁸

With the growth of such tensions, it was hardly a surprise that the Black Sea became a primary theater when Russia launched its full-scale invasion of Ukraine on February 24, 2022. According to Secretary of State Antony Blinken, “Russian naval operations have demonstrated the intent to control access to

the northwestern Black Sea, the Sea of Azov, to block Ukrainian ports.”²⁹ In the first hours of the war, Russian forces carried out amphibious assaults on Snake Island (Острів Зміїний) and near the port of Mariupol on the Sea of Azov.³⁰ With support from naval artillery, Russian ground forces then sought to take control of Ukraine’s entire coastline. The fall of Mariupol, Berdyansk, and Kherson consolidated a “land bridge” from the Russian border to Crimea, completely isolating Ukraine from the Sea of Azov.³¹ Russian forces have also struck Odesa, the largest port remaining under Ukrainian control, on multiple occasions, though a planned amphibious assault in the first days of the war failed to materialize.³²

Prior to the signing of a UN and Turkish-mediated agreement creating a grain export corridor in July 2022, a Russian naval blockade had effectively choked off Ukraine’s grain exports, 95 percent of which were shipped from Black Sea ports before the war.³³ Despite efforts by the United States and European Union to organize rail transport, as well as the opening of the export corridor (guaranteed by Turkey), the security of maritime transit to and from Ukraine remains in doubt.³⁴ The Russian blockade contributed to significant food price inflation around the globe, raising fears of famine in parts of Africa and Asia.³⁵ Even with the signing of the grain corridor agreement, Moscow’s ability to choke off trade from Ukraine’s Black Sea ports still provides it leverage to press for an end to (or at least a rolling back of) sanctions imposed since the start of the war. Indeed, Russian officials have suggested they are unhappy with the agreement’s implementation, though pressure from Turkey and countries in the Global South forced Moscow to abandon threats to leave the agreement.³⁶

The larger geopolitical implications of the blockade and Russia’s control of the northern Black Sea littoral are significant as well. Despite military setbacks on land and sea in the summer and fall of 2022, Russia continues to limit Ukraine’s access to the global commons through the Black Sea and the Bosphorus and Dardanelles Straits—and Russia’s strategic ambition remains to eventually capture more of Ukraine’s coastline, including the port of Odesa. Even with the losses suffered by its Black Sea Fleet and the recapture of Kherson by Ukrainian forces, Russian control of Crimea and the Sea of Azov allow it to carry out attacks on Ukraine and interfere with maritime traffic across the Black Sea.³⁷ The further extension of Russian political or military domination of the northern Black Sea coast would leave Ukraine effectively landlocked. If Ukraine cannot export raw materials or import finished products through its Black Sea ports, it will of necessity become increasingly dependent on less efficient land routes—including, in the event of a military defeat, on trade with and transit through Russia. These outcomes would carry significant costs not just for Ukraine but for the Black Sea littoral states and purchasers of Ukrainian agricultural and other goods as well.

Russia is similarly taking advantage of the war in Ukraine to pressure the South Caucasus and Central Asian states—as well as NATO ally Turkey—to constrain their economic, political, and strategic cooperation with Europe. Snap military drills that can close off critical sea lanes for months at a time, exclusive economic zone (EEZ) claims, and harassment of civilian vessels risk leaving the states on the Black Sea’s southern and eastern rims increasingly vulnerable and isolated.³⁸ Volatility in and around the Black Sea also leaves foreign companies more reluctant to invest in new projects, such as the planned deep-sea port at Anaklia, Georgia, or the development of oil and gas reserves in Turkey or Romania’s EEZs.³⁹ Moscow is meanwhile using financial, informational, and other tools to shape public opinion and political decisionmaking, taking advantage of weak governance, democratic backsliding, and state capture in much of the region.

By the end of 2022, the combination of Western-supplied weapons, Ukrainian ingenuity and resilience, and Russia’s military operational ineptitude had eroded the combat capabilities of Russia’s

Black Sea Fleet, badly damaged the bridge linking Russia to occupied Crimea across the Kerch Strait, and driven Russian forces from the major cities of Kharkiv and Kherson. Increasingly bottled up at Sevastopol and Novorossiysk to avoid the anti-ship missiles that sank the *Moskva*, the Black Sea Fleet now risks being cut off from combat operations on land—more so following the delivery of additional U.S. long-range rocket artillery and anti-ship missile systems.⁴⁰ Yet the blockade persists, and Russian forces still control the key ports of Mariupol and Berdyansk. Nor have Russian ambitions been moderated, as the announcement of “partial” mobilization on September 21 suggests—even as rising prices and political volatility indicate that many European states’ appetite for an enduring confrontation with Moscow may be limited.

Even with Ukraine’s tactical successes, the combination of military uncertainty in the Black Sea plus littoral states’ weaknesses and hedging heralds further pressure if Russian influence in the wider BSR remains intact. U.S. and NATO interests in the region are thus not confined to Ukraine—though the outcome of the war in Ukraine will have an enormous impact on future security and stability across the wider BSR—and will likely be the most important factor affecting future U.S. strategy toward the region. Even as the United States and its allies continue their support for Ukraine, they need to maintain a wider perspective that recognizes the importance of a free and open BSR and of strengthening connectivity among the Black Sea littoral states and between the littoral states and Euro-Atlantic institutions, including both NATO and the European Union. Doing so requires understanding how the littoral states—all of which (apart from Russia) are NATO allies or partners—perceive the war and their own evolving interests in the Black Sea.⁴¹

The Perspectives of Black Sea Littoral States

The war in Ukraine profoundly affects the wider Black Sea region. The impact is particularly acute for the littoral states and their immediate neighbors because the war directly threatens their security and because the region's preexisting fissures mean that they will continue to struggle to define a common vision for how to respond. NATO allies Bulgaria, Romania, and Turkey have not found common ground among themselves, much less agreed on a regional strategy that might also encompass Georgia, Moldova, and Ukraine. Except for Turkey, the littoral states are relatively weak countries, and all face significant challenges related to the rule of law, corruption, Russian influence, economic dependence on Russia (particularly for energy), and democratic backsliding. Russia's war in Ukraine and its attempts to militarize the Black Sea pose significant challenges for all of them, as well as for neighboring states in the Western Balkans, eastern Mediterranean, South Caucasus, and Central Asia.

So long as the littoral states are not directly involved in the war, adopting a comprehensive Black Sea strategy with regional leadership is unlikely. Romania plays an important role as an anchor for the United States and NATO in the BSR, while Turkey has the military capabilities but not the political incentives to take on more of a leadership role. As a result, the United States and NATO have had to work with the regional states on a piecemeal and sometimes ad hoc basis. It is therefore critical for policymakers in Washington (and Brussels) to have a nuanced and comprehensive understanding of how these littoral states conceptualize the threats in and around the Black Sea, what forms of assistance they prioritize, and how they might respond to enhanced U.S. engagement in the region.

Turkey

With NATO's second-largest military (after the United States), control of the Bosphorus and Dardanelles Straits, and a political elite committed to bolstering the country's strategic autonomy, Turkey remains the linchpin for U.S. and NATO strategy in the BSR. Though Turkey has been a NATO ally since 1952, it has since the end of the Cold War positioned itself as an increasingly independent regional power, leaning into the alliance only when it serves a narrower set of national interests.⁴² Especially in recent years, this commitment to an independent foreign policy has included looking to Moscow for economic opportunities and political support.

Russia's expanding military footprint in and around the Black Sea nevertheless constrains Turkey's own options and poses risks to its security; as one former official pointed out, a missile launched from Crimea could hit Ankara in a matter of seconds.⁴³ While Turkey remains wary of confronting Russia directly, the shifting power balance around the Black Sea provides an incentive for Ankara and its NATO allies to seek common ground as they prepare for what is likely to be an enduring strategic competition—even as Turkey continues pursuing a multifaceted relationship with Russia. The United States and NATO will have to strike a careful balance, encouraging Turkey to be more forward leaning without abetting President Erdoğan's efforts to undermine Western sanctions on Russia.

A key element in Turkey's pursuit of strategic autonomy is its emphasis on maintaining a kind of regional condominium over the Black Sea, based on Ankara's strict interpretation of the 1936 Montreux Convention. This agreement limits the number, tonnage, and duration of stay of non-littoral state warships in the Black Sea and allows Ankara to restrict or prevent the passage of naval ships through the straits in wartime.⁴⁴ While U.S. and other allied officials sometimes bristle that Turkey's strict adherence to Montreux limits the deployment of NATO assets, Turkish officials see the convention as a cornerstone of regional security. Above all, it provides international recognition of Turkey's ownership of the straits, which the Russian Empire and the Soviet Union repeatedly challenged.⁴⁵ Ankara views firm adherence to Montreux as a guarantee against an expansion of regional conflicts and sees it as consistent with a rules-based international order.⁴⁶ By reinforcing a localized détente with Russia in the Black Sea, Montreux also allows Turkey to prioritize maritime operations in the Aegean and eastern Mediterranean, where its aims are frequently at odds with those of other allies, especially Greece and France—not to mention Cyprus, whose government Turkey does not recognize and has blocked from joining NATO.

Ankara's pursuit of what one academic called "competitive cooperation" with Moscow—including Turkish efforts to bypass U.S. and EU sanctions imposed over Russia's invasion of Ukraine—remains a source of tension with other NATO allies as well.⁴⁷ For historical and geographic reasons, Turkey identifies the conflict with the Kurdistan Workers' Party (PKK), which extends into Syria and Iraq, as a larger threat than Russian expansion around the Black Sea. Given Russia's role as the guardian of the Syrian regime and principal power broker in Syria, cooperating with Russia in and around the Black Sea helps Ankara secure Russian acquiescence to its red lines with respect to the PKK and its affiliates.⁴⁸ Ankara also understands that it needs to maintain a working relationship with Moscow to secure its bottom-line objectives in the conflicts stretching from Libya to Syria to the South Caucasus, where Russian and Turkish forces remain engaged on opposite sides.⁴⁹ As a senior Turkish official put it, productive relations with Russia "are a necessity, not a choice" for Turkey.⁵⁰

Since the end of the Cold War, Russia has also become a critical economic partner for Turkey. It supplied 44 percent of Turkey's gas and around one-fifth of Turkey's oil in 2021 and is constructing Turkey's first nuclear power plant at Akkuyu.⁵¹ Russia is also an important source of tourists and a market for Turkish agriculture and construction firms, many of which are close to Erdoğan's Justice and Development Party (AKP). Moscow has often used Turkey's economic vulnerability and dependence on Russia as a source of leverage—restricting tourist travel in 2015 and again in 2021 and freezing work on Akkuyu for several years.

With a depreciating currency and inflation that could exceed 80 percent in 2022 ahead of presidential elections next year, Turkey further seeks to position itself as an outlet for Russian trade and investment, even as its U.S. and European allies tighten sanctions; in the months following the full-scale invasion of Ukraine, the value of Turkish exports to Russia increased 46 percent relative to the previous year.⁵² Nor has Turkey closed its airspace to Russia—apart from military flights to Syria—or limited the ability of Russians to enter the country. Indeed, many Russian oligarchs fleeing personal sanctions in the United States or European Union have been spotted in Turkey—along with a much larger number of young, well-educated Russians (and Ukrainians). Ukrainian officials have accused Turkey of facilitating, and even profiting from, the sale of stolen grain.⁵³ In August 2022, Putin and Erdoğan reached an agreement for Turkey to pay for energy deliveries in rubles and facilitate operation of the Mir payment system in Turkey, to the consternation of many other allies (Ankara later walked back its support for Mir under U.S. pressure).⁵⁴ Ankara also welcomed Russia's offer to use Turkey as a hub for gas sales to Europe following the explosion that shut down the Nord Stream 1 pipeline in September 2022.⁵⁵

This pursuit of economic cooperation amid sanctions reflects Ankara's broader strategy of cultivating ties with Moscow as a hedge against dependence on what many Turkish officials and analysts view as an unreliable West. While the roots of this Turkish-Russian rapprochement go back to the 1990s, it has become more salient since 2015–16 owing to (1) Erdoğan's dissatisfaction with U.S. support for groups aligned with the PKK in Syria and (2) Washington's seemingly lukewarm response to the July 2016 coup attempt by elements in the Turkish Armed Forces associated with the U.S.-based cleric Fethullah Gülen (Turkey regards both the PKK and the Gülenists as terrorists, and officials react with equal parts bewilderment and anger to what they see as U.S. support for both groups).⁵⁶ Erdoğan's decision to purchase the Russian S-400 air defense system in the wake of the coup attempt was a particular triumph for the Kremlin—resulting in Turkey's expulsion from the U.S.-led F-35 fighter program and preventing the deployment of NATO-standard air defense capabilities along the Turkish-Syrian border. The S-400 remains one of the key stumbling blocks to a full reconciliation between Ankara and its NATO allies. Yet for reasons of prestige—and because it aligns with the pursuit of strategic autonomy—Ankara now considers the S-400 issue a “closed chapter” that NATO has to accept.⁵⁷

Despite its complex relationship with Russia and increased skepticism toward NATO within the Turkish elite, Turkey has consistently supported Ukraine's territorial integrity, including Crimea.⁵⁸ Since 2014, Ankara has also taken steps to bolster its own capabilities and those of its allies. It continues investing in new surface and coastal defense capabilities (notably the TCG Anadolu-class light carrier/amphibious assault ship).⁵⁹ Turkey's navy has also increased its presence in the Black Sea while deploying maritime patrol aircraft, tankers, and fighter jets to frontline allies and partners, some of whom (notably Romania) are also seeking to purchase Turkish drones. Ankara has also nurtured a long-term defense industrial relationship with Kyiv that has facilitated joint production of drones, engines, ships, and other capabilities. The most visible product of this relationship is the TB2 Bayraktar

armed drone that Turkey continues supplying to the Ukrainian military, though Turkish officials are at pains to describe these as purely commercial transactions.⁶⁰ During President Erdoğan's visit to Kyiv in February 2022, the two countries agreed to establish a production facility for Turkish drones inside Ukraine; this deal seems to remain in place despite the Russian invasion.

Turkey's traditional balancing act between Russia and NATO has become more complex since the outbreak of full-scale war in Ukraine, even as the war has bolstered Ankara's perception of its own importance for NATO.⁶¹ Ankara has prioritized avoiding being drawn into the conflict while using its ties to both Moscow and Kyiv to position itself as a mediator. Turkey's most notable contribution may be brokering and guaranteeing the agreement to export grain from Ukrainian ports, which established a maritime coordination center in Istanbul, and which the Turkish navy is charged with enforcing. Turkey was also instrumental in negotiating a September 2022 prisoner swap.⁶² Turkish officials often claim that their Western NATO allies do not sufficiently appreciate either its support for Ukraine or its larger diplomatic role.

Ankara now recognizes that the war has made its traditional preference for a condominium approach to security among the Black Sea littoral states impossible. Thus far, however, Ankara has been reluctant to articulate a vision for what could replace this approach. Jealously guarding its status as custodian of the straits, Ankara remains opposed to a permanent NATO presence in the Black Sea. It also worries that other allies will push NATO into adopting a needlessly confrontational approach to Moscow—and it still promotes the idea of a negotiated settlement to the war in Ukraine.⁶³ While Turkish officials believe that Ankara can protect its own security interests in the Black Sea (including by maintaining a working relationship with Moscow), some of the other littoral states are wary of Turkish intentions and reluctant to see Ankara take on greater responsibility for regional security outside a NATO framework.

Despite the importance Ankara assigns to its relationship with Moscow, Russia's militarization of Crimea and attempts to sever lines of communication across the Black Sea represent a significant challenge to Turkish interests and could have implications for Turkey's long-term commitment to NATO. For now, they provide a strong argument for the importance of NATO as a cornerstone of Turkey's security, despite growing anti-Western sentiment among much of the Turkish elite and the attempt to balance between NATO and Russia. Helping Ukraine emerge from the conflict victorious would therefore bolster the pro-Western elements in the Turkish elite who have seen their influence erode since the failed coup. At the same time, pushing Turkey to adopt a more forward-leaning posture in the Black Sea should be part of a broader effort at improving relations between Washington and Ankara.

Georgia

Russia's campaign to dominate the Black Sea could have a particularly significant impact on Georgia, where political volatility and state capture have exacerbated existing vulnerabilities as the competition in and around the Black Sea deepens. With around one-fifth of its territory and almost two-thirds of its coastline under Russian occupation, Georgia has limited agency in shaping regional security dynamics. Yet, with its pro-European orientation, NATO partner status, and location astride key transit routes connecting Europe to the Caspian Sea and Central Asia, Georgia's sovereignty and independence matter; as NATO's 2022 Strategic Concept states, the "security of countries aspiring to become members of the Alliance is intertwined with our own."⁶⁴

The occupation of South Ossetia/Tskhinvali and Abkhazia in August 2008 deepened Georgia's political fragmentation and complicated the Georgian government's efforts to regain control over the entirety of its internationally recognized territory. Since 2008, Russian forces have continued chipping away at Georgian territory through the process of "borderization," or moving the de facto boundary lines further into Georgia proper.⁶⁵ Russian control of Abkhazia constrains Georgia's connectivity across the Black Sea, holding at risk Georgia's remaining ports of Batumi and Poti, which Russian forces targeted in 2008, as well as nearby road, rail, and pipeline infrastructure.⁶⁶ Since 2008, Russia has reinforced its military presence in Abkhazia, deploying S-300 air defense systems, Tochka missiles, and other capabilities that many Georgians see as part of Russian preparation for a renewed offensive.⁶⁷ Even without further kinetic operations, officials perceive Russian "hybrid sea control and sea denial" activities, such as snap exercises that disrupt shipping, as an imminent threat.⁶⁸ Because Georgia's military spending remains low (around \$300 million per year) and Russian forces sank or captured the whole Georgian navy during the 2008 war, Tbilisi lacks significant maritime capabilities of its own.⁶⁹ It therefore prioritizes deepening multilateral cooperation, especially through its coast guard, as a vital part of its maritime and coastal security.

Since the 2003 Rose Revolution, Georgia's security strategy has centered on achieving rapid political and strategic integration with the Euro-Atlantic West. Under former president Mikheil Saakashvili (2004–13), Georgia carried out extensive privatization, security service reform, crackdowns on official corruption, and other steps aiming to transform Georgia along "European" lines. Under the auspices of NATO's Partnership for Peace and its own Integrated Partnership Action Plan, Georgia developed deep institutional ties with NATO and contributed significant numbers of troops to the wars in Afghanistan and Iraq.⁷⁰ Along with Montenegro (which would join NATO in 2017), Georgia was one of only two states to adopt an Annual National Program to pursue its NATO membership aspirations. These steps were rewarded with NATO's 2008 Bucharest Declaration stating that Georgia (and Ukraine) "will become" members of the alliance; the U.S. military also came to Georgia's aid during the 2008 Russian invasion, airlifting Georgian troops back from Iraq and dispatching a destroyer with humanitarian aid after a ceasefire was in place.⁷¹

Georgia also positioned itself as a vital transit state connecting Europe to the Caspian Basin and thence to Asia. Beginning with the opening of the Baku-Supsa oil pipeline in 1998, construction of new oil and gas pipelines, roads, and railways knitted Azerbaijan, Georgia, and Turkey to European markets. This new infrastructure helped Georgia, along with Azerbaijan, reduce its dependence on Russia while giving Europe a stake in its political and economic success. Securing these transit routes is therefore critical to Tbilisi's ability to maintain its pro-Western orientation. Russia has made repeated efforts to undermine them through investments that would give Moscow a veto over their operations or construction of bypass routes such as the TurkStream gas pipeline. Russia also maintains the capability to disrupt critical infrastructure across Georgia through cyber or kinetic operations, such as a cyberattack that caused an explosion on the Baku-Tbilisi-Ceyhan oil pipeline during the 2008 war.⁷²

Moscow's ability to sever these transit routes represents a threat not only to Georgia but to Europe's strategy of energy diversification and to the broader project of consolidating a liberal order in Eurasia. Because of Georgia's limited military capacity and vulnerability to Russian coercion, Tbilisi would like to see a much more robust NATO presence both in and around the Black Sea, including joint exercises, port visits, and intelligence sharing, to deter further Russian aggression. Georgian officials emphasize that Tbilisi has done all that NATO has asked of it as far as enhancing readiness and contributing to NATO missions (including in Afghanistan) but worry that the alliance is not taking its concerns seriously enough.⁷³

Georgian worries about the extent of Western support are mirrored by growing concern in the United States and Europe that Georgia's domestic politics are moving in the wrong direction and that, as a result, Tbilisi cannot be counted on as a reliable partner. Georgia therefore risks finding itself caught in a vicious circle, with Tbilisi's internal problems encouraging the United States and NATO to adopt a strategy of hedging, despite perceptions of a mounting Russian threat. The war in Ukraine has made these concerns acute, with Tbilisi seeking reassurance from the West even as it scrambles to avoid giving Moscow any justification for renewed aggression. Prime Minister Irakli Garibashvili and other officials have called for a rapid end to the war, declined to impose sanctions, welcomed large numbers of Russian expatriates, and obstructed efforts to provide military assistance to Ukraine.⁷⁴

Equivocation over the war in Ukraine also reflects the larger processes of democratic backsliding and state capture that have accelerated since the ruling Georgian Dream (GD) party came to power in 2013. GD remains closely tied to the ambitions of the oligarch and former prime minister (2012–13) Bidzina Ivanishvili, who made the bulk of his fortune in Russia, including through a large stake in the Russian gas monopoly Gazprom.⁷⁵ While Ivanishvili claims to have left politics since stepping down as head of GD in early 2021, members of the opposition and civil society continue to regard him as the power behind the throne and to see his influence in Tbilisi's reluctance to fully support Kyiv.⁷⁶ Regardless of Ivanishvili's impact on Georgian foreign policy, the decade since GD has come to power has seen growing corruption, deepening polarization, state capture, and a resurgence of authoritarian tactics, including persecution of Saakashvili and his supporters.⁷⁷ These shifts have made Georgia's political system less responsive to public opinion, which remains strongly pro-Western and pro-Ukrainian. They have also helped entrench a community of interest between kleptocratic elites in Georgia and in Russia; in that sense, state capture is itself a vehicle for Russian influence. Beyond state capture, Moscow has also had success promoting its narrative about a conflict between its so-called traditional values and a "decadent" West, including within the hierarchy of the Georgian Orthodox Church.

Corruption, democratic backsliding, and state capture also complicate Georgia's relationship with the United States and its European allies. U.S. officials note that state capture limits Georgia's capacity to absorb and employ foreign assistance or to mount the kind of decentralized defensive campaign that Ukraine is currently undertaking.⁷⁸ These concerns, in turn, limit Washington's willingness to provide military and other assistance to Tbilisi, reinforcing the threat of Georgia's strategic decoupling from the West. Georgian officials worry that they will be left out of whatever package of measures the United States, NATO, and the European Union adopt to help secure Ukraine. Notably, Georgia was not included when the European Union announced in June 2022 that Moldova and Ukraine would be granted candidate status. Tbilisi similarly worries that any bilateral or multilateral security guarantees that Ukraine obtains as part of an agreement to end the war will not extend to Georgia and that, as a result, Georgia will emerge less secure even in the event of a Russian defeat.⁷⁹

Despite its attempts to stay on the sidelines, the war in Ukraine and Russia's campaign to dominate the Black Sea will have dramatic implications for Georgia's security and strategic orientation. Tbilisi's pro-Western course—including its role as a transit state for energy and other goods to Europe—depends on maintaining secure communications across the Black Sea. Regardless of whether Moscow intends to carry out further military operations against Georgia, its ability to hold at risk Georgia's outlet to Europe through the Black Sea imposes a powerful check on Western influence not merely in Georgia but in the South Caucasus and Central Asia more generally.

Romania

Romania is the largest littoral state that is a member of both NATO and the European Union, and it has pushed the United States to develop a Black Sea strategy for some time. Bucharest broadly shares the U.S. assessment of the threat posed by Russia, and the Romanian National Defence Strategy identifies the BSR as of “paramount strategic interest” and Russia as an “aggressive” threat.⁸⁰ Romania aspires to play a leadership role for NATO in the southeast, and it provides humanitarian and military support for Ukraine, though the latter has been limited by a decade of underinvestment in Romanian defense modernization between 2006 and 2016.⁸¹ It calls for a “comprehensive approach” to the BSR that covers both military and economic issues, transport, energy, environment, and resilience.⁸²

Senior Romanian government officials describe Russia’s full-scale invasion of Ukraine as an escalation of the conflict that began in 2014 and an attempt to demoralize Ukraine, strangle its economy by cutting it off from the Black Sea, and destroy the civilian and military infrastructure that Kyiv has relied on to engage with the West and operationalize its military support during the conflict.⁸³ They see Russia’s continuing aggression in Ukraine as dramatically affecting Romanian national security. They worry about Russia’s attempts to control Ukraine’s southern coast and, especially, Snake Island. Russia made multiple attempts early in the war to destroy the Zatoka bridge—the only road and rail route from Odesa to the West—and to capture Snake Island, which sits just 45 miles off the Romanian coast. These attacks suggested that Russia’s overarching strategic aim was to extend its land bridge through the Odesa Oblast, potentially connecting to Transnistria, the 250-mile-long strip of land in Moldova controlled by a Russia-backed de facto administration, creating a land border with Romania for the first time in thirty years.

Since Ukraine’s counteroffensive began in August 2022, Russia’s operational setbacks offer Romania only a temporary relief. Many in Romania believe that Russia’s strategic aims for the region remain unchanged. If Russia were to achieve eventual control over Snake Island, it could further disrupt commercial shipping in and out of Odesa as well as in and out of the Danube delta ports and, hence, threaten Romanian ports in the delta and along the coast. The port of Galați, for example, proved essential for shipping agricultural products out of Ukraine while Odesa was blockaded during the summer. Russian control of Snake Island could create renewed legal uncertainty around the delimitation of the continental shelf and the EEZs between Romania and Ukraine, which were settled in 2009 after a decades-long bilateral dispute.⁸⁴ Such uncertainty would have implications for both countries’ minerals as well as for oil and gas exploration and extraction. Ukraine’s rockets and artillery have pushed Russian forces off Snake Island, and Russia has since suffered further military operational setbacks. Romanian officials hint, however, that unless Russia’s strategic ambition is defeated in the BSR, they expect Moscow to regroup, rearm, and try again.

Russia’s dominance in the BSR has depended on its naval capabilities as well as on increasing hybrid attacks and influence operations. Naval hybrid attacks have become a major concern for Bucharest. Moscow has closed off large swathes of the Black Sea for exercises, some of which disrupted Romanian commercial shipping. Moscow has also in some cases announced and then canceled such exercises, presumably to demonstrate political control and ability to disrupt freedom of navigation at will.⁸⁵ The vulnerability of Romania’s offshore energy assets is another source of concern—especially in the wake of the September 2022 attack on the Nord Stream 1 pipeline in the Baltic Sea. Russia has also increased cyber and information campaigns against Romania since the start of the war, targeting democratic

institutions with anti-Western narratives; it continuously portrays Romania's hosting of Aegis Ashore launchers, part of NATO's ballistic missile defense systems, as provocative. Russia has violated Romania's air space with increasing frequency, and officials expect these events to continue even if a ceasefire for Ukraine is put into place.⁸⁶

Romania has long sought a stronger NATO presence in the region, but the political geography is complex. Not only do threat perceptions diverge among NATO allies in the BSR, but Bucharest has concerns about pro-Russian forces among its neighbors, including in Hungary and Serbia, and about a vulnerable Moldova on its northeastern border. Moldova west of the Dniester was once part of Romania, and there is still some segment of the population in both countries—possibly as high as 35 percent in Moldova and 70 percent in Romania—that favors eventual reunification.⁸⁷ Moldova is precariously located along Ukraine's western border; it has achieved EU candidate status, but socioeconomic fallout from the war and an influx of refugees could still threaten Moldova's security and its stability.⁸⁸ Russia maintains approximately 1,400 troops in Transnistria, officially to protect ammunition depots, which store up to 20,000 tons of mostly expired and some still usable armaments; Russian officials have stated that any attacks on these forces will be a *casus belli*.⁸⁹ Bucharest fears any miscalculation or political or military destabilization of Moldova proper, Transnistria, or the volatile Gagauzia region, where Russia also stokes separatist sentiment.⁹⁰

Since 2015, Romania significantly increased defense spending, accelerated its defense modernization, especially for land and air, and has attempted to elevate Black Sea security to a priority issue for the United States, NATO, and the European Union. Romania's modernization began in earnest between 2015 and 2018.⁹¹ It made significant investments in F-16s, acquiring 17 in 2016 from Portugal and accelerated plans to procure an additional 32 from Norway. It also invested in armored vehicles, Patriot surface-to-air missiles, and High Mobility Artillery Rocket Systems (HIMARS). Bucharest is now focused on continued modernization; acquiring naval capabilities; intelligence, surveillance, and reconnaissance (ISR); and coastal defense. It is also shoring up resilience, including through the new Euro-Atlantic Resilience Centre, and addressing challenges in the information environment. Russia's campaigns push anti-Western messages, including over the fuel and vegetable oil shortages and the grain crisis last year. It has had less success in exploiting the Romanian Orthodox Church; the church's leadership largely rejects Putin's narratives, though some factions push Russian narratives at lower levels in the church.⁹²

Romania has continuously sought to elevate Black Sea security as a priority for the United States.⁹³ Bucharest consistently called out Russia's aggression in the region and has made significant investments in infrastructure, including at the Mihail Kogălniceanu base, with its strategic location on the northwest shores of the Black Sea; at the Câmpia Turzii base, a new hub for NATO in the region; and by hosting missile defense systems at the Deveselu air base. Bucharest has also sought to promote regional cooperation in the NATO frameworks. In 2016 it proposed a Black Sea Fleet for NATO, but it proved unsuccessful, Iulia-Sabina Joja argues, in part because of differences in threat assessments vis-à-vis Russia with NATO allies Bulgaria and Turkey.⁹⁴ Romania stood up the Multinational Brigade South-East in Craiova, and then the Multi-National Division Southeast Headquarters (for NATO's tailored Forward Presence), and the Multinational Corps in Sibiu should be operational by 2024. Bucharest has supported NATO's new battlegroups for Slovakia, Hungary, Romania, and Bulgaria. It sought approval to buy Bayraktar drones from Turkey and is open to increased air and maritime cooperation with Ankara and with Sofia, which hosts a maritime coordination center in Varna, Bulgaria.⁹⁵

Some officials in the Ministry of Foreign Affairs suggested their threat assessments can at times be compounded by concerns that the United States and Western European allies still have a “superficial” understanding of the threat from Russia.⁹⁶ For Bucharest, the war in Georgia was a wake-up call, and some officials were frustrated that the United States responded with an attempt to “reset” relations with Russia. Then, Russia’s annexation of Crimea provided further evidence of Russia’s aggression in the southeast, but NATO focused its reassurance efforts on allies in the the northeast. NATO’s tailored Forward Presence in Romania was a smaller and less capable force than the Enhanced Forward Presence in the Baltics and in Poland. Some Romanian officials fear that some Westerners are still reluctant to confront Russia in the region. These fears run deep: they date back to the failure of Western security guarantees during World War II when the fall of France nullified the security guarantees Bucharest received as part of the Little Entente: in July 1940, Romania was forced to give up...rest of the country.”⁹⁷ If Ukraine is asked to accept territorial concessions, it would trigger these fears and increase strategic uncertainty for Romania.

Bulgaria

Alongside Romania, Bulgaria is the only other Black Sea littoral state that a member of both NATO and the European Union. Sofia is committed to addressing Black Sea regional security challenges together with its NATO allies and EU member states. It has generally supported the steps that NATO has taken to strengthen regional defense and deterrence in southeastern Europe since 2014—with one prominent exception. Bulgaria opposed Romania’s 2016 Black Sea regional fleet proposal after initially agreeing to it; then Bulgarian prime minister Boyko Borisov was effectively caught up in a power struggle between Moscow and Ankara and, likely bowing to Russian pressure, rejected Romania’s call for a joint regional Black Sea flotilla.⁹⁸ Bulgaria generally sought to preserve good relations with Russia since the end of the Cold War, and Russia has exploited that good will and Bulgaria’s economic and energy dependence to strengthen its influence and undermine democratic institutions.

Bulgaria has not been able to imagine itself as a net contributor to regional security. It struggled to modernize its defense forces for years because of weak institutions, limited funds, and recently, political instability and fragile coalition governments. Also, it paid relatively little strategic attention to the BSR in the past. Historically, Bulgaria has not identified as a maritime state despite its coastline; its post-Cold War orientation looked westward toward achieving NATO and EU membership and addressing instability in the Western Balkans. For much of the post-Cold War period, Bulgarians sought friendly relations with Moscow, and saw no direct threat from the East. Implicit in NATO’s enlargement waves after the Cold War were assumptions that Bulgaria’s eastern neighbors—Ukraine, Georgia, and possibly even Russia—might be next to join the Euro-Atlantic institutions and that some kind of partnership with Russia was possible. During Bulgaria’s transition to democracy, officials saw NATO as a stepping-stone to the European Union and as a “finish line” for Bulgaria’s national security.⁹⁹ NATO had no requirement and there was no incentive for Sofia to undertake major defense reforms or invest in modernizing its equipment after joining the alliance.

Bulgaria’s place in NATO and the European Union is widely accepted by the Bulgarian people and by all major political parties, including the Bulgarian Socialist Party (BSP), the legal successor to the Bulgarian Communist Party.¹⁰⁰ And yet there is also a sense of ambivalence in Bulgaria with respect to

the Euro-Atlantic institutions that affects Bulgaria's defense and security policies. Bulgarian scholar Rumena Filipova argues that ambivalence reflects the role of identity politics in Bulgaria as well as the country's process of "Europeanization." She describes Bulgaria's Europeanization as "thin" or "ambivalent" and argues that both Western Europe and Russia were treated as "others" in Bulgaria's national identity formation. Western Europe was seen at times as a "utopia to emulate" and, at others, as a "hostile, exclusive and distant entity that [did not] appreciate the states on its periphery."¹⁰¹ Russia, on the other hand, was seen as Bulgaria's liberator from centuries of Ottoman domination, though disappointment with Moscow remains a constant theme.¹⁰² As a result, Bulgaria has developed both pro-Russia and Russia-critical segments of society and it is particularly vulnerable to anti-Western and anti-democratic narratives.

In contrast to Romania and other smaller states in the BSR, Bulgarians experienced no widespread "awakening" to Russia's revisionist threat, influence operations, or hybrid warfare after Moscow illegally annexed Crimea and then destabilized eastern Ukraine in early 2014. Even in the wake of Crimea's annexation, Bulgaria still sought to preserve good relations with Moscow for domestic political reasons and because of Russia's significant influence resulting from historic and cultural ties and Bulgaria's political, economic, and energy dependencies.¹⁰³ A small group of academics did begin sounding the alarm, however, about Russian hybrid attacks. In 2015, Russia was suspected of poisoning a Bulgarian arms dealer, Emilian Gebrev, and there were reports of suspicious explosions in his factories, including as recently as July 2022.¹⁰⁴ These incidents were not properly investigated at the time, in part because of corrupt interests. As Bulgaria's then-president Rosen Plevneliev said in 2015, Bulgarian intelligence was "not willing to counter Russian intelligence and hybrid warfare" in the country.¹⁰⁵

Russia's full-scale invasion of Ukraine however, could mark a major turning point in Bulgaria's bilateral relationship with Russia and also in its relationships to the Euro-Atlantic institutions.¹⁰⁶ Russia's invasion and brutality have reverberated powerfully in Bulgaria. Bulgarians were deeply shocked by Moscow's aggression against Ukraine, and they turned out in droves to publicly protest the war in the early weeks after the invasion.¹⁰⁷ At the time, Bulgaria's pro-Western prime minister Kiril Petkov hoped to demonstrate Bulgaria's unequivocal support for Ukraine and express full solidarity with NATO and EU partners in opposing the war. He was partially successful: the government joined EU sanctions, expelled several Russian diplomats, and offered to repair military equipment for Ukraine. Pro-Western officials hoped to do more, but internal political divisions between pro-Russia and Russia-critical politicians as well as narratives about Bulgaria's supposed "neutrality" in the conflict (despite membership in NATO) limited the government's initial response.¹⁰⁸

Indeed, Petkov's coalition government nearly collapsed over a parliamentary debate in April 2022 over whether Bulgaria should send weapons to Ukraine in the aftermath of the invasion. Pro-Western politicians in parliament hoped Bulgaria might do more for Ukraine, including, for example, by donating some of Bulgaria's legacy Soviet equipment—which could have made a difference in the conflict—and then perhaps gaining credit to recapitalize Bulgaria's national capabilities (as Slovenia did).¹⁰⁹ However, Bulgarian president Rumen Radev and the BSP—part of the four-party governing coalition—refused to allow shipment of ammunition to Ukraine, arguing that it could drag Bulgaria into conflict and make it a direct party to the war. Ultimately, Ukraine's president Volodymyr Zelensky offered a path for compromise by requesting only the repair of military equipment.¹¹⁰ This proposal allowed Bulgaria to publicly side with Ukraine without sending ammunition. Since then, Bulgaria found ways to quietly ship weapons to Ukraine, and in November 2022 lawmakers finally voted to

send heavy military aid to Ukraine.¹¹¹

Bulgaria generally shares concerns with the other littoral states about Russia's attempts to dominate the Black Sea and undermine freedom of navigation. The Bulgarian navy has pointed to the Russian revisionist threat for some time, citing Russia's anti-access/area denial (A2/AD) capabilities in Crimea and its closures of international waters for military exercises as threats to Bulgaria.¹¹² The government in Sofia sees some limits, however, to what NATO can do to counter Russia in the Black Sea maritime space, in part because of Bulgaria's attempts to preserve good relations with Russia and because of Turkey's commitment to strictly upholding the Montreux Convention. For Bulgaria, which has a very small navy, inter-allied cooperation at sea has been complicated by Sofia's efforts to preserve good relations with Moscow and by its deep-seated suspicions of a militarily strong and politically independent Turkey, which it fears could use its position in NATO for national purposes. (Pro-Russian forces and nationalists in Bulgaria also exploit this narrative for their own purposes). A Bulgarian defense official claimed he feared the Black Sea could become a "Turkish-Russian lake."¹¹³

While Romania has focused on addressing a direct threat from the east, Bulgaria has increased its focus on addressing Russia's channels of influence in Bulgaria, especially through corruption and rule of law challenges. Former prime minister Petkov said in a recent interview that his government had managed to "curb corruption locally but found we had a bigger enemy: Russian influence," noting "corruption and Russian influence in Bulgaria are the same thing."¹¹⁴ Interlocutors in the Bulgarian Ministry of Defense spoke at length about how Russia exploits corrupt interests in the economy and in the media and elsewhere for influence; they mentioned that even Facebook's content moderator in Bulgaria has opaque ties to Russia.¹¹⁵ Russia benefits from corruption and also from preserving political instability in Bulgaria. When Petkov's government fell in June 2022, President Radev appointed a caretaker government and instructed it to avoid "getting caught up in the conflict" with Russia.¹¹⁶

The war in Ukraine has shed light on domestic political divisions and on Bulgaria's significant political, economic, and energy dependencies on Russia. Early in the conflict, Petkov's government was able to manage the politics and begin to significantly reduce the dependencies, especially in energy, and chip away at Moscow's channels for malign influence in Bulgaria. Perhaps the most important of those channels since the end of the Cold War has been the Bulgarian people's general goodwill and trust in Russia. After Russia's full-scale invasion in February, public attitudes in Bulgaria changed markedly. A majority of Bulgarians had begun to view Russia as the main threat to their security; more than 60 percent favored tougher sanctions against Moscow, and Putin's approval rating more than halved to 25 percent.¹¹⁷ Whether these public opinion trends continue in Bulgaria depends on what happens in the war in Ukraine and on whether Russia can recover its goodwill by stirring nationalist and anti-democratic sentiment in Bulgaria, exploiting prolonged political instability or reconstituting some of Bulgaria's dependencies on Russia.

Bulgaria also reduced its dependence on Russia as a source of energy. In late April 2022, Russia cut gas supplies to Bulgaria and Poland after contracts came up for renewal and both countries refused to make payments in rubles. At the time, Bulgaria was dependent on Russia for approximately 90 percent of its gas supply. Petkov called Russia's decision "blackmail" and pursued plans to diversify Bulgaria's energy sources, including by striking a deal with Azerbaijan and accelerating progress on a Bulgaria-Greece interconnector. The United States can help Bulgaria and Greece (and others in the Western Balkans) diversify by providing liquefied natural gas through a new facility in

Alexandroupolos, Greece.¹¹⁸ In the nuclear sector, Bulgaria struggled to transition its Kozluduy nuclear power plant to alternative fuels, but fuel for the plant will likely come from non-Russian suppliers in the future.¹¹⁹ Petkov's efforts met some domestic resistance, however. BSP leader Korneliya Ninova called for negotiations with Gazprom to resume supply, and future governments will face pressure to demonstrate that it is both possible and cheaper to diversify.

Since the 2022 escalation of the war in Ukraine began, the Bulgarian government has expelled several Russian diplomats and dismissed senior Bulgarian officials on counts of espionage, including the former defense minister Stefan Yanev. While in office early in the war, Yanev repeated the Russian verbiage about a "special military operation" and attempted to prevent Sofia from expressing full solidarity with Ukraine and with Bulgaria's NATO allies. Yanev is also reported to have tried to stall progress on NATO's battlegroup for Bulgaria, insisting on national leadership for the battlegroup and calling on NATO only to fill any necessary gaps. After resigning, Yanev started a new political party, Bulgaria Rise, with some support from within the military, to focus on traditional conservative values.¹²⁰ The short-lived coalition government under Petkov managed to generally strengthen Bulgaria's contributions to NATO and the alliance's presence in Bulgaria, but it had to do so while managing the optics for domestic political purposes.

The war in Ukraine has brought a stronger NATO to Bulgaria. Bulgaria now hosts one of the new NATO battlegroups and has taken steps to increase cooperation with Romania, its most important regional ally.¹²¹ Bulgaria supported NATO's Headquarters Multinational Division Southeast and the tailored Forward Presence after 2016, and it hosts a NATO Force Integration Unit and a Center of Excellence. It engages in cross-border air policing missions and training at Novo Sela, and it has stood up a new Maritime Coordination Center in Varna, which could take over the coordination function from Allied Maritime Command (MARCOM) in Northwood, United Kingdom if opposition from allies, such as Turkey, can be overcome. The summer 2022 blockage of the sea lines of communication also brought a new openness in Bulgaria to potential cooperation with Turkey and a new sense of urgency for Bulgarian defense modernization.¹²² The country's Soviet-vintage MiG-29s cannot be serviced in Russia or Ukraine and will soon come out of service; the next generation will be U.S. F-16s, just as in Romania.¹²³ Once Bulgaria operates F-16s, it will cut the ties with Russia that shaped a generation of air force generals' perspectives (including that of President Radev) and open channels for closer cooperation with Romania.

Political instability in Bulgaria persists, however, and Russia has an interest in perpetuating it. A stable majority seems out of reach and there is no guarantee that a next government will be any stronger or more stable than Petkov's four-party coalition. Bulgaria has more work to do to address corruption and rule of law challenges, cut dependencies on Russia, and address Russia's influence in the media and information environment. Academics and analysts who follow Bulgarian politics closely, however, believe that the war in Ukraine dealt a serious blow to Russia's traditional channels of influence. Even those Bulgarians who still support cooperation with Russia are having to review their position; the Kremlin simply cannot keep them on its side.¹²⁴

Toward a New U.S. Black Sea Strategy

Many of the building blocks for a comprehensive U.S. Black Sea strategy are already in place. Russia's 2022 invasion of Ukraine has focused U.S. and European attention on the region. At an extraordinary NATO summit in March, the allies agreed to strengthen defense and deterrence in southeast Europe and the United States has significantly expanded its force presence in Europe. Through diplomacy and intelligence sharing, the United States succeeded, in the first phase of this war, in restoring leadership in NATO and generating solidarity across the alliance and more broadly. Sweden and Finland decided to apply for NATO membership, and the alliance has adopted a new Strategic Concept that identifies Russia as the "most significant and direct threat to Allies' security and to peace and stability in the Euro-Atlantic area."¹²⁵

The challenge now, as the United States implements its National Defense Strategy and as NATO implements a new Strategic Concept, is to continue support for Ukraine while developing a framework to address Black Sea security in a comprehensive way. The framework should go beyond hardening NATO's borders to include military, economic, energy, information, security assistance, and other measures, and it should marshal the capacities, capabilities, and experiences of the littoral states and relevant organizations, including NATO, the European Union, and the Organization for Security and Cooperation in Europe (OSCE). It should work across seams, including in the United States between the United States European Command (EUCOM) and United States Central Command (CENTCOM) (whose areas of operations cover the Middle East and Central Asia) and across NATO and EU members and partner states.

The centerpiece should be learning to think about the BSR as a coherent space that is deeply interconnected to surrounding regions—Europe, as well as the Caspian and eastern Mediterranean. Because the BSR comprises states with varying relationships to Euro-Atlantic institutions, building a comprehensive

strategy based on a shared understanding of the Black Sea security environment has proven difficult. Allied defense planning, particularly in the context of a major war against Russia, also remains challenging. The littoral states that are NATO allies or NATO partners, however, all share interests in regional cooperation to improve shared situational awareness, restore the balance of power in the Black Sea, and ensure that the international norms and rules that governed the region in the past are upheld. These include national sovereignty, territorial integrity, freedom of navigation, open lines of communication for telecommunications and energy, and connectivity among the Black Sea littoral states and between the region and the neighboring European Union, Caspian, Middle East, and eastern Mediterranean.

The war in Ukraine now plays a critical role. The conflict raised the salience of the BSR for Europe. It has highlighted regional vulnerabilities in the face of an expansionist Russia as well as the West's challenge of safeguarding its interests in a region where states have different perceptions of the Russian threat and varied relationships with NATO and the European Union. Concerned about the potential economic consequences and terrified that the war will spread, some states—Bulgaria, Georgia, and Turkey—are more reluctant to implement measures that Moscow might perceive as provocative. Their reluctance is of different degrees and for different reasons but is at least in part bound up with Russian influence and challenges with corruption, rule of law, and democratic resilience. It also reflects wariness about how the war will play out and the danger that a resentful, expansionist Russia could regroup, rearm, and seek other targets.

The United States and its allies should in the short term focus on scaling up security assistance to Ukraine in a way that suggests they are serious about enabling Kyiv to push Russian forces from its territory and end the war on favorable terms. Though the outcome of the war remains unclear, a long-lasting confrontation between Russia and the West is almost certain to ensue. While the Black Sea has arguably been a secondary consideration for U.S. and NATO planners since 2014, the prospect of sustained confrontation in the region requires the alliance to place a higher priority than in the past on (1) deterring Russian aggression against NATO allies, while increasing support for neighboring partner states Georgia, Moldova, and Ukraine and encouraging cooperation between allies and partners; (2) maximizing the free movement of goods, people, and ideas in all directions around and across the Black Sea; and (3) maintaining robust ties with governments and people east of the Black Sea.

Because of the war in Ukraine and its wide-ranging impact on the BSR, the United States has an opportunity to strengthen its leadership in the region and put a new strategy in place that includes a comprehensive approach to regional security, strengthens deterrence and defense, improves regional allies and partners' resilience to Russian influence across domains and across the spectrum of conflict, and builds on advantages against Russia's coercive actions. The new U.S. Black Sea strategy should include several main pillars:

1. STRENGTHEN U.S. LEADERSHIP AND PRESENCE.

The United States demonstrated decisive leadership in generating unity in Europe in response to the outbreak of war in Ukraine through diplomacy, consultations with allies, and intelligence sharing. U.S. attention and presence in the region matters; it signals to Black Sea allies and partners as well as to Russia that the United States remains focused on the BSR even as it prioritizes other regions and issues. Indeed, U.S. resources and bandwidth will be limited by priorities in the Indo-Pacific and elsewhere, but there is still no regional ally or group of allies that can substitute for U.S. leadership or catalyze regional cooperation. As Jim Townsend argued in his 2021 congressional testimony, “it

does not have to be the U.S. that shoulders this burden alone, but it does fall to the U.S. to lead the way.”¹²⁶ U.S. leadership and presence can facilitate burden sharing and support the development of a comprehensive strategy, even if the United States is not always at the forefront operationally.

In the military realm, the United States should incentivize regional cooperation and accelerate the modernization of regional forces. The United States has already dispersed forces to Romania, Bulgaria, Hungary, and elsewhere, and it should ensure that enablers are in place should NATO’s battlegroups need to be supplemented by additional forces.¹²⁷ The United States should ensure NATO makes progress toward military mobility and readiness goals and incentivize cooperation among regional allies, including in maritime ISR, coastal defense, and air policing. The United States should accelerate F-16 deliveries for Bulgaria and authorize third-party transfer for Romania’s F-16 deal with Norway. It should attempt to secure congressional authorization for F-16 sales to Turkey while being open to sharing other capabilities with Ankara.

The United States’ financial, economic, and diplomatic presence are equally important because regional security challenges are multidimensional. The United States should put pressure on NATO and the European Union to coordinate military activities with economic, energy, information, and other initiatives designed to address regional states’ weaknesses and dependencies that Russia has exploited for decades (and which China is also able to exploit). Such programs include the Three Seas Initiative, which supports infrastructure and connectivity within the BSR as well as with neighboring regions and the global economy. The United States should support closer cooperation between NATO and the European Union as well as with the OSCE and others in support of a comprehensive approach to BSR security.

The United States has a particularly important role to play in ensuring support for NATO partner states, which cannot count on the protections of Article 5. With both Moldova and Georgia suffering from political uncertainty and instability, U.S. options are limited. Nevertheless, continued, visible engagement, especially through military channels, remains an important tool for reinforcing Georgia and Moldova’s alignment with Euro-Atlantic institutions. At the same time, Ukraine’s impressive resistance against Russian aggression has highlighted the value of relatively small, inexpensive air and coastal defense systems, drones, and other low-end capabilities that can be shared with partner states without compromising NATO readiness. The alliance should also do more to integrate Chişinău and Tbilisi into a shared situational awareness framework through information sharing and provision of sensors and other tools. Regional connectivity initiatives (see below) should also encompass Georgia, Moldova, and other vulnerable partner states where possible.

2. BOLSTER NATO IN THE SOUTHEAST.

The United States should push NATO to go beyond strengthening defense and deterrence for the three allies in the southeast flank along the Black Sea littoral. NATO should also sustain and strengthen support for Ukraine and other regional partners and enhance flexible and “minilateral” security cooperation among allies and between allies and partners within and outside of NATO structures. NATO recognized that its presence in the southeast was inadequate after 2014 and has since taken steps to rebalance its attention and resources from the Baltic states and Poland to the southeast. These efforts included the deployment of four new battlegroups for the region and a significant increase in high-readiness forces to 300,000 troops, which reflects the vision and recommendations laid out by Center for European Policy Analysis authors in 2020 in their report, *One Flank, One Threat, One Presence*.¹²⁸

To defend “every inch” of NATO territory, the alliance should also take steps to strengthen the weaker allies along the Black Sea littoral—especially Romania and Bulgaria—by facilitating their modernization, by making more frequent senior-level visits, and by incentivizing bilateral cooperation between Romania and Bulgaria as well as among the allies along the wider eastern flank, including Poland and Greece. To be credible, defense plans for Turkey must be synchronized with national plans, capabilities development, training, and exercises—and plans must be in place to surge multinational forces along the coast, including with air and missile defense and prepositioned equipment. Modernization need not entail enormous financial outlays. Relatively inexpensive uncrewed systems (both aerial and maritime) and coastal defense capabilities can have a significant impact, including for protection of vulnerable offshore energy assets.

Deterring attack on the NATO allies is inadequate for the southeast, however. NATO must sustain its support for Ukraine and Georgia and enhance cooperation among allies and partners both within and outside of NATO structures. NATO and its partners should strengthen their sea power in ways that are consistent with the Montreux Convention, which does not restrict non-littoral states’ ability to dispatch land or air assets to the region. NATO can enhance its sea power through more mobile coastal defense capabilities, through cooperation among the littoral states’ navies and coastguards for situational awareness, and by building on NATO’s maritime presence with the annual U.S.-led Sea Breeze exercise and others open to partner participation. The United States should take advantage of an opportunity to strengthen cooperation between Romania and Turkey at sea and encourage the transfer of NATO’s maritime coordination function from MARCOM in Northwood, United Kingdom, to Varna, Bulgaria.

3. PURSUE A NEW STRATEGIC EQUILIBRIUM WITH TURKEY.

Enhancing NATO sea power will depend on improving relations between the United States and Turkey. Given resource constraints and the need to focus on the Indo-Pacific, any U.S. strategy for the Black Sea will have to encompass a larger role for Turkey; as one U.S. defense official put it, NATO’s options for a stronger defense posture in the Black Sea are “Turkey or nothing.”¹²⁹ With its improving naval capabilities (including sea-launched uncrewed aerial vehicles) and strong relationships with most of the other regional states, Turkey seems like a natural cornerstone for an enhanced allied presence in the Black Sea. Ankara, however, remains wary of taking on a more prominent role not just because of internal political and economic difficulties but because it seeks to avoid an escalation of the conflict with Russia, prioritizes other theaters and threats, and questions the extent to which NATO will back it up in any clash that does occur. Other allies and partners, meanwhile, remain wary of a more assertive Turkey. Washington’s challenge, therefore, is to encourage Ankara to do more for regional security while ameliorating other states’ concerns.

Regardless of the state of its relationships with Washington or Brussels, Turkey’s interest in preventing Russian domination of the Black Sea and commitment to deepening ties with Ukraine and the states of the South Caucasus are broadly consistent with U.S. and NATO priorities. The United States should therefore seek opportunities to work with Ankara on enhancing regional security, leveraging Turkey’s special relationships, especially with Kyiv and Tbilisi, to promote shared objectives. Whether under the NATO umbrella or outside it, Turkey can provide partner states additional capabilities that bolster their resilience and military capabilities—drones in the first instance but also naval platforms, air defense, domain awareness, and others.

A more active partnership in the Black Sea can be one component of a broader effort to revive pragmatic cooperation with Turkey. Such cooperation will require the United States to account both for Ankara's interests outside the North Atlantic space and for its pursuit of greater strategic autonomy, while also offering reassurance to allies wary of a more ambitious Turkey. Many of the sources of Turkish mistrust toward the United States and NATO are almost ontological and therefore beyond the scope of any specific policy to resolve; others are exacerbated by preelection campaigning. However, at least some problems in the bilateral relationship can be addressed—including securing congressional approval for the sale of F-16s, lightening export restrictions, and downgrading U.S. involvement with PKK-linked groups in Syria. Likewise, the United States could do more to meet Turkey's requests for air defense capabilities, perhaps in the context of a deal to sideline the S-400 and exempt Turkey from sanctions under the Countering America's Adversaries Through Sanctions Act. Reducing support for PKK-aligned forces in particular would send an important signal that the United States takes Turkish security concerns seriously, which would be critical for getting Ankara to be more forward-leaning on U.S. priorities elsewhere, including in the Black Sea and southeastern Europe.

Enhancing Washington's own operations and basing in the eastern Mediterranean, while working diplomatically to ameliorate some of the tensions between Ankara and Sofia—and between Ankara and Athens—would also allow Turkey to shift more of its existing assets to the Black Sea. Turkey's offer of its Anadolu-class ships to the alliance as a shared NATO capability should also be seriously considered.

Such steps should be offered as part of a broader agreement to improve U.S.-Turkish strategic cooperation, with Washington continuing to press Ankara over its provocations toward NATO allies and undermining of U.S. sanctions (on Russia as well as on Iran). Rather than seeking complete agreement with Ankara, the United States should focus on securing Turkish buy-in on a handful of key issues—including ensuring a forward presence in the Black Sea. Given Ankara's emphasis on Montreux, any enhanced allied presence in the region will have to remain within the convention's restrictions.¹³⁰ In addition to rotational naval deployments and patrols allowed under Montreux, NATO should emphasize joint operations in the land and aerial domains. Improved situational awareness, air policing, and coastal defense would all enhance regional security while remaining compliant with Montreux. To ensure greater buy-in from the other littoral states, the United States should also encourage Turkey to participate in multilateral operations and initiatives wherever and whenever possible. Such cooperation need not take place under the NATO umbrella; "minilateral" cooperation with states like the United Kingdom and Poland can act as both a force multiplier and a source of reassurance for the other littoral states. A Turkey that is more embedded in multilateral initiatives and on better terms with Washington will be a better partner for both the smaller littoral states and other NATO allies.

With the AKP emphasizing nationalist posturing and pursuing trade and other deals with Russia to shore up Turkey's flailing economy, more serious efforts to reset U.S.-Turkish relations will have to wait until Turkish domestic politics have—hopefully—calmed down following presidential elections this spring. Either a reelected Erdoğan or a new leader from the opposition might be more pragmatic about NATO and the United States, especially if Washington is willing to address Ankara's ongoing concerns about Syria and the PKK. Yet Turkey's transformation into a major regional power with priority interests along its southern border and in the eastern Mediterranean will continue, regardless of whether Erdoğan and the AKP remain in power.

4. EMPHASIZE AND STRENGTHEN DEMOCRATIC RESILIENCE.

The United States and NATO must consider regional security and resilience in a comprehensive and inclusive way. Russia's expanding footprint was the result of not only military deployments but success in establishing points of leverage in the political and economic systems of NATO allies and partners alike through corruption, dependencies, and other forms of malign influence.¹³¹ This problem is particularly acute in the wider BSR (along with the Western Balkans), with its constellation of states burdened with weak institutions, ethnic rivalries, and post-Communist political systems. State capture is a significant problem in Georgia, while disinformation and Russian financial flows have further eroded democratic governance in Bulgaria and Moldova. Romania is endangered by persistent cyberattacks, naval hybrid warfare, and disinformation targeting its democratic institutions. State capture, Russian disinformation, and malign influence make BSR states less secure and less capable partners for the United States and NATO.

Economic and democratic resilience are the responsibility of individual states, but the United States, NATO, and the European Union play an important role in pushing Black Sea states to strengthen the rule of law and counter corruption, two of the main vehicles for Russian malign influence. They can increase the share of funds devoted to democratic resilience, support efforts to reduce economic or energy dependence on Russia, and help allies and partners move away from legacy Soviet military equipment. The United States and its allies and partners should also keep a watchful eye on the media environment in the BSR, ensure transparency around ownership of mass media, and facilitate exchanges and other programs to build media literacy skills across the region. NATO must continue to demonstrate benefits of Euro-Atlantic integration, deploy counter-hybrid support teams to address diverse threats, and build on local initiatives such as the Euro-Atlantic Resilience Center in Bucharest.

5. PROMOTE REGIONAL CONNECTIVITY.

Equally important is reducing these states' vulnerability to Russian economic coercion. Because of the war and sanctions on Russia, a growing share of east-west transit is already moving through Central Asia, the South Caucasus, and southeastern Europe (a regional trade association expects the yearly volume of cargo moving through Central Asia and the Caucasus to increase sixfold in 2022).¹³² Not only does that shift allow regional states to capture greater transit revenues, it also creates an opportunity to accelerate the development of critical infrastructure and accelerate economic decoupling from Russia. Sustaining that decoupling over the longer term requires investment in new roads, railways, pipelines, fiber-optics, port facilities, and other infrastructure. As with the Anaklia port project, geopolitical complexity (including Russian influence) and high up-front costs act as a brake on investment. Even China is pulling back because of debt concerns.¹³³

This environment provides an opportunity for the United States and its allies to revive the effort to enhance connectivity that animated U.S. and European policy in the late 1990s. Governments and international financial institutions such as the European Bank for Reconstruction and Development and the Asian Development Bank should prioritize projects of strategic significance, such as a Georgian deep-sea port and additional Caspian pipeline capacity, by providing loan guarantees, insurance, and offers of security assistance to encourage investment. The European Union took an important step in this direction in July 2022 when it agreed with the government of Azerbaijan to boost gas imports and enhance the capacity of the Southern Gas Corridor.¹³⁴ These institutions should similarly be willing to assist Turkey with the development of new hydrocarbon sources in the Black Sea and

(subject to agreement with its neighbors) the eastern Mediterranean. That approach would require an acknowledgment that projects of strategic significance cannot always be left to the market and that a greater degree of state support will likely be necessary to hedge risk and mobilize the necessary investment. It also requires thinking about infrastructure and connectivity as strategic initiatives in parallel with military support. Using existing frameworks like the Three Seas Initiative and the Southern Gas Corridor for building out connectivity across the wider BSR can ensure synergies between new projects while prioritizing those that enhance regional security and stability.

Conclusion

The Russian invasion of Ukraine has brought to a head long-standing concerns among U.S. allies and partners about the deteriorating security environment across the greater BSR. Regardless of how the war concludes, the Black Sea and its environs will remain on the front lines of strategic competition between NATO and Russia. How the United States manages its commitments to regional allies and partners will have a decisive impact on the outcome of that competition. Because of the region's fragmentation and location on the far edge of NATO's zone of responsibility, it represents a particularly challenging environment, but one whose importance the United States should not underestimate. Ensuring a more secure and stable Black Sea would offer a substantial benefit not just to the region itself but to Europe writ large—and to states further east that depend on the Black Sea as an outlet to the West.

Despite the risks they face from a more aggressive Russia, regional states' caution in the face of the invasion of Ukraine reflects their own anxieties, above all about the extent to which they can count on NATO protection in a crisis. The alliance's comparative neglect of the Black Sea, even after 2014, has contributed to these anxieties. Fearful of Russian revanchism, keen to preserve friendly relations with Russia, or uncertain about NATO's ability to protect them, allies such as Turkey and Bulgaria and partners such as Georgia have walked a careful line in their dealings with Moscow. This understandable caution, has in turn, created openings for Russian information and other influence operations. NATO now faces something of a vicious circle: fearful governments have gone out of their way to avoid provoking Russia, in the process complicating U.S. and other allied efforts to adopt a more robust response. Uncertainty prompts strategic hedging, which only creates further uncertainty.

Cutting this Gordian knot requires recognition that the Black Sea can no longer be peripheral to the campaign of checking Russian aggression. Regional allies and partners need to resolve their own

disputes and adopt a more cooperative approach to regional security. Doing so, however, will require an infusion of at least some U.S. leadership, forces, equipment, and attention. The Black Sea should not be a distraction from the pacing threat of China or other security challenges, but it ought to be seen (and resourced) as a crucial theater in its own right.

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